Easy Call Now – Hosted Dialler

User Manual

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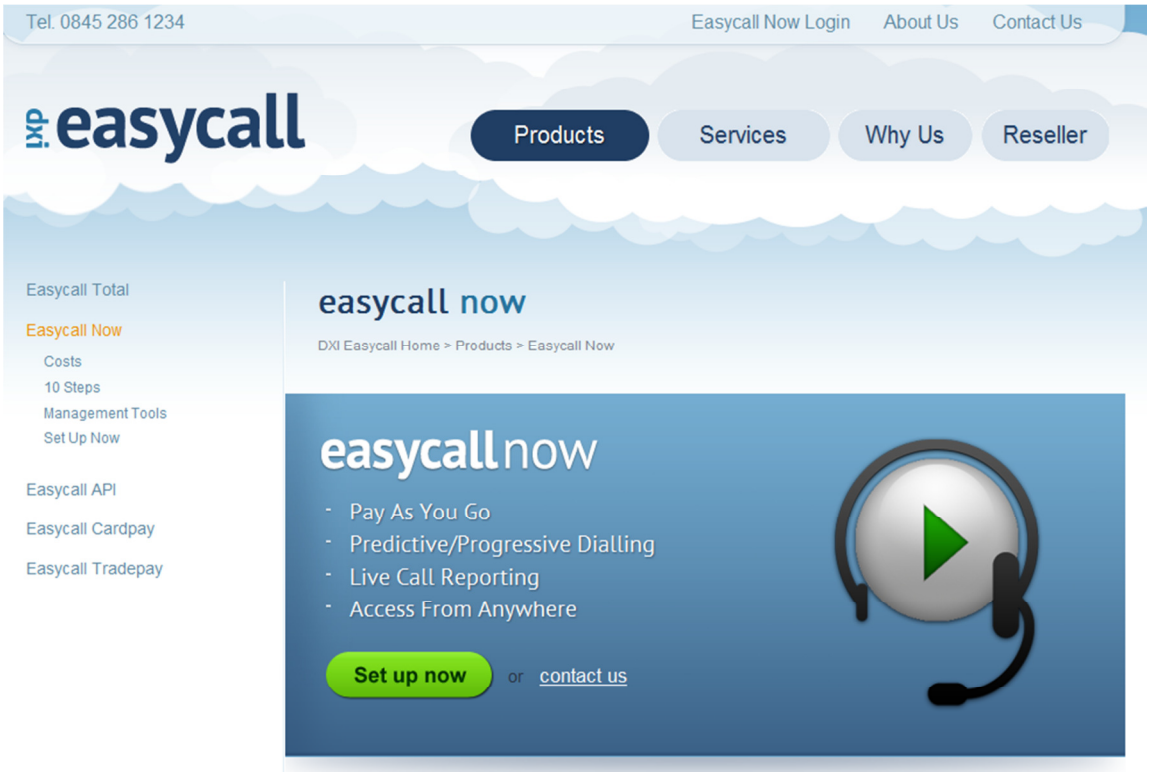
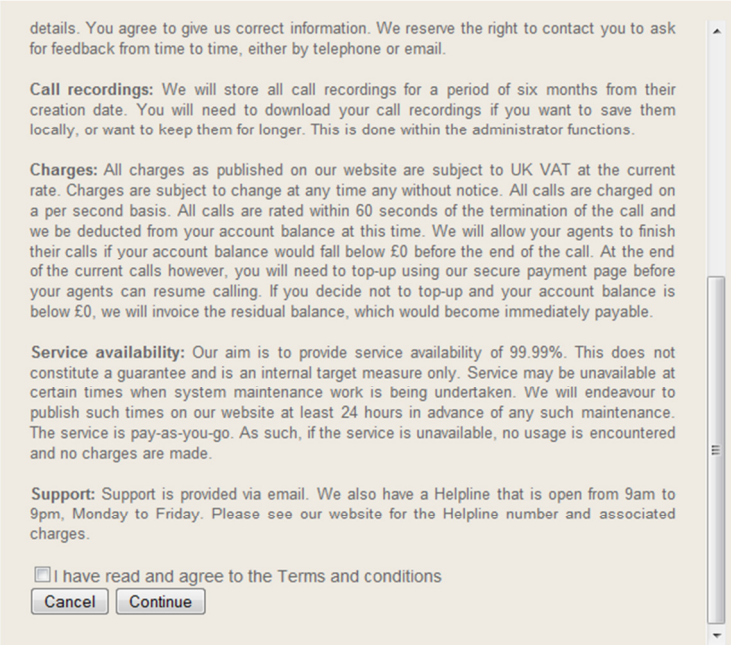
Easycallnow

The easycallnow home page can be found at www.easycallnow.net
This page is the core of the easycallnow system you can build your campaign from this page by clicking on the Set up now link also login to dial and administer campaigns.



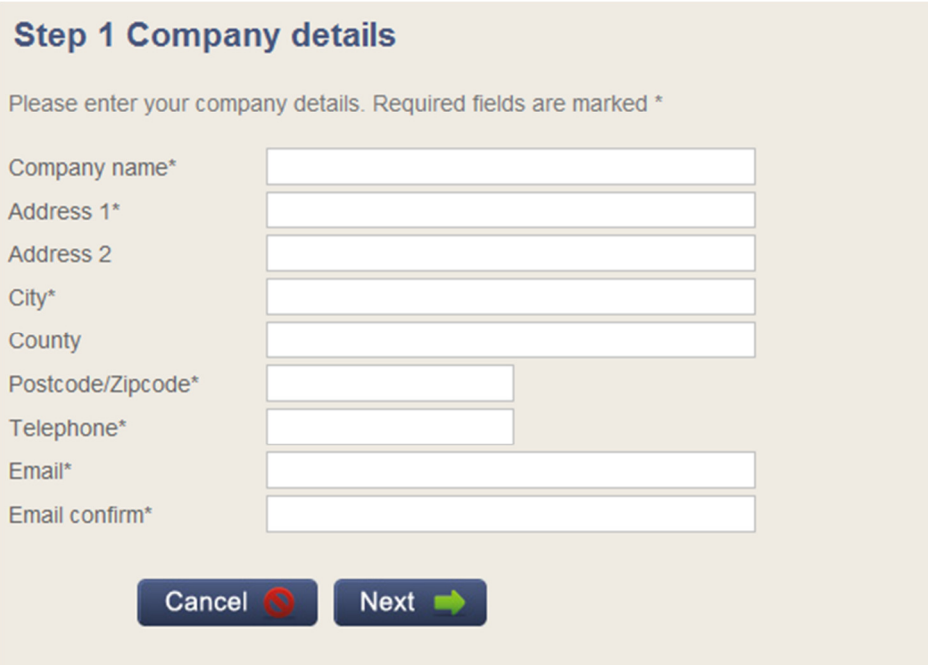
Creating a campaign
Using the campaign wizard -

Selecting the Sep up now hyperlink of the easycallnow home page displays the terms and conditions of use, once you have read and agreed to them you can continue to building your campaign.


details. You agree to give us correct information. We reserve the right to contact you to ask for feedback from time to time, either by telephone or email.
Call recordings: We will store all call recordings for a period of six months from their creation date. You will need to download your call recordings if you want to save them locally, or want to keep them for longer. This is done within the administrator functions.
Charges: All charges as published on our website are subject to UK VAT at the current rate. Charges are subject to change at any time any without notice. All calls are charged on a per second basis. All calls are rated within 60 seconds of the termination of the call and we be deducted from your account balance at this time. We will allow your agents to finish their calls if your account balance would fall below £0 before the end of the call. At the end of the current calls however, you will need to top-up using our secure payment page before your agents can resume calling. If you decide not to top-up and your account balance is below £0, we will invoice the residual balance, which would become immediately payable.
Service availability: Our aim is to provide service availability of 99.99%. This does not constitute a guarantee and is an internal target measure only. Service may be unavailable at certain times when system maintenance work is being undertaken. We will endeavour to publish such times on our website at least 24 hours in advance of any such maintenance. The service is pay-as-you-go. As such, if the service is unavailable, no usage is encountered and no charges are made.
Support: Support is provided via email. We also have a Helpline that is open from 9am to 9pm, Monday to Friday. Please see our website for the Helpline number and associated charges.
I have read and agree to the Terms and conditions
Cancel
Continue

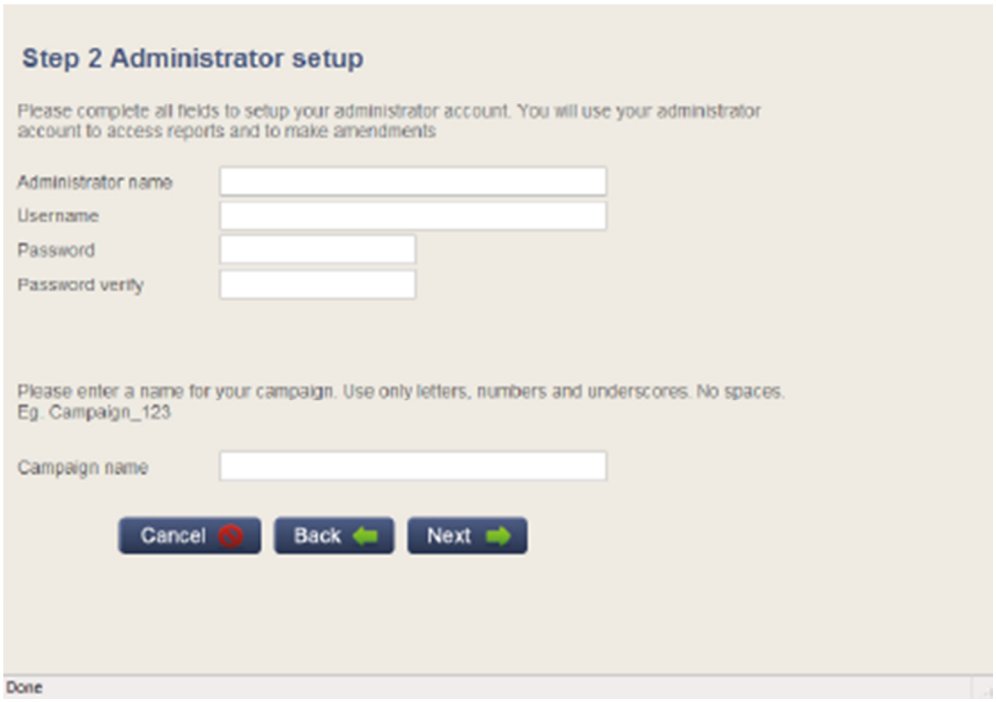
Step 1 Entering company details

This step is to capture the company details so we can correspond with your company.



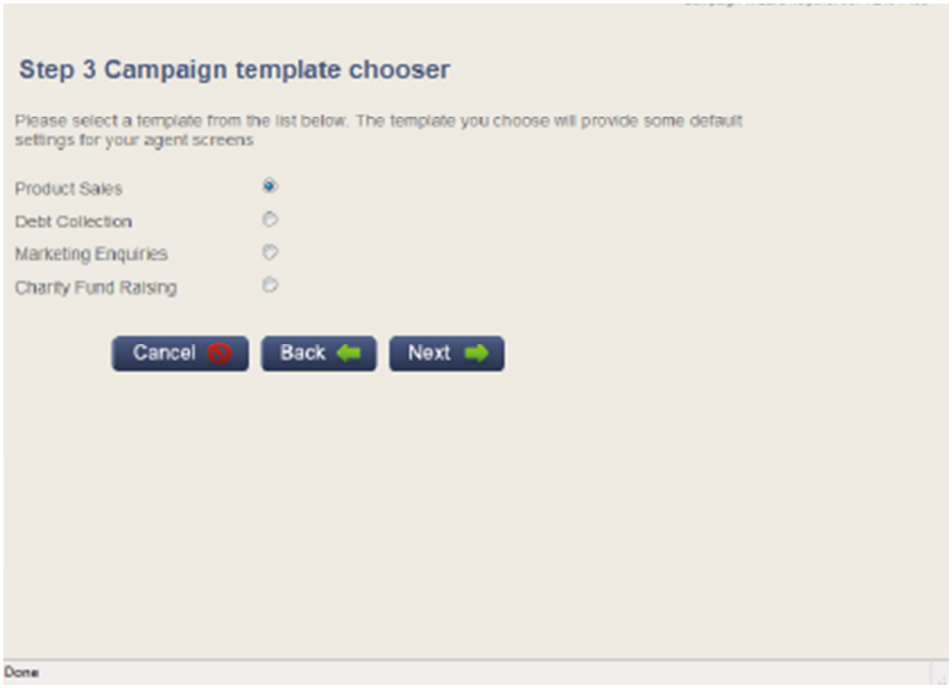
Step 2 Administrator setup

Capturing the administrators setup details, the administrator can access all reports and add and amend users, this step is also used to create the campaign name. The campaign name must use only letters, numbers and underscores no spaces. For example; Easycallnow_campaign.


Step 2 Administrator setup
Please complete all fields to setup your administrator account. You will use your administrator account to access reports and to make amendments
Administrator name
Username
Password
Password verify
Please enter a name for your campaign. Use only letters, numbers and underscores. No spaces. Eg. Campaign_123
Campaign name
Cancel
Back
Next
Done

Step 3 Campaign template chooser

Use this step to select a template for the campaign; this option will create some default setting.

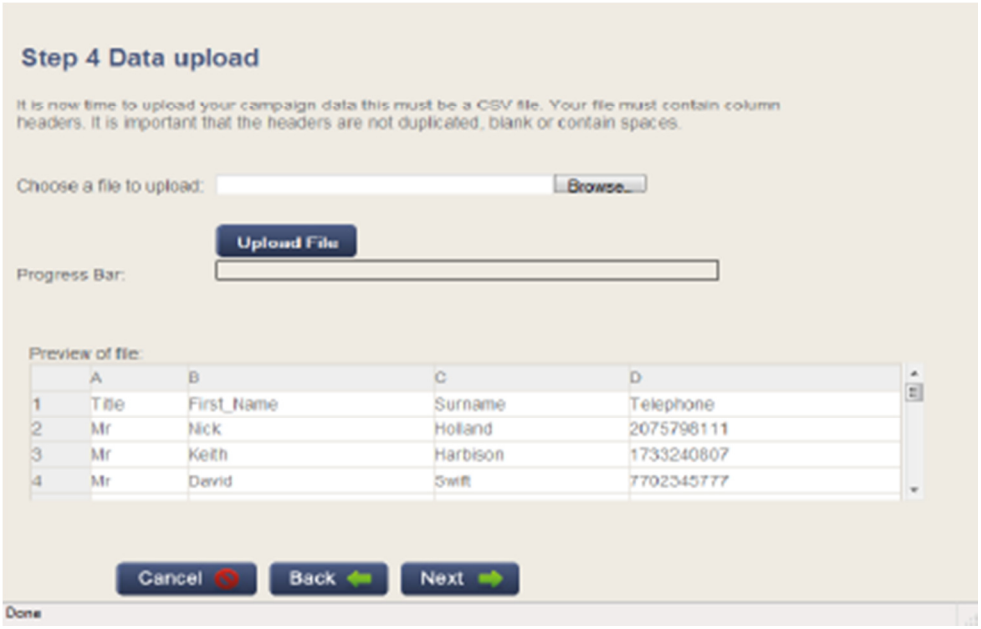


Step 4 Data upload

Your first calling data is to be uploaded on this screen; the file should be in a CSV format and contain column headers.

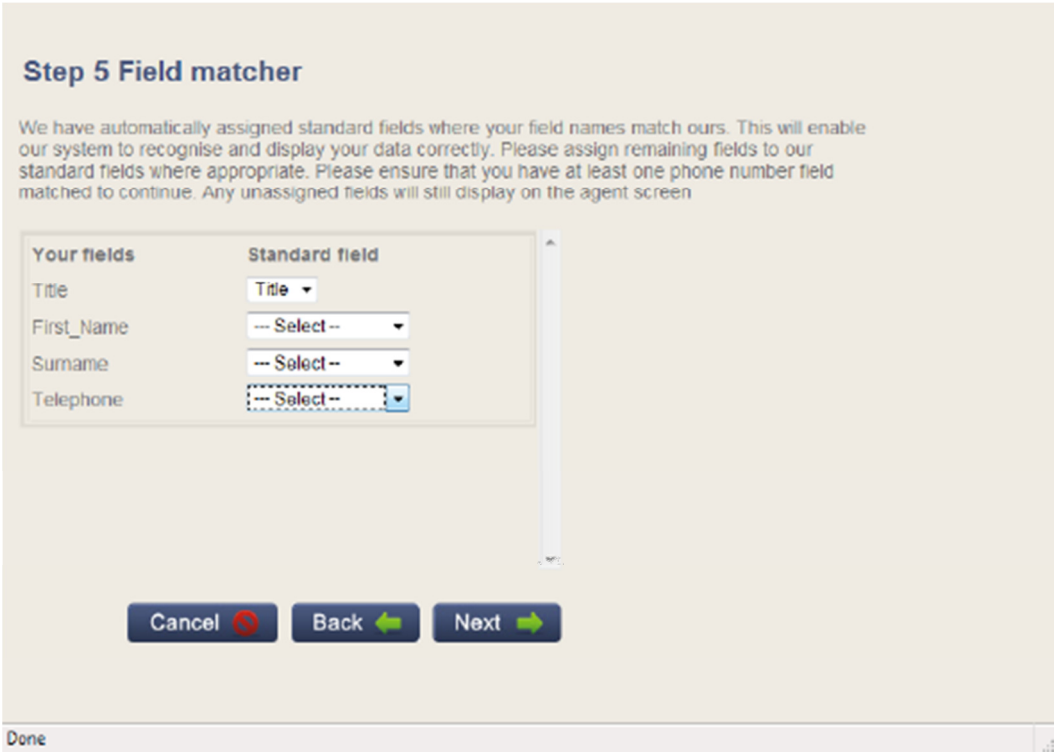
Step 4 Data upload
It is now time to upload your campaign data this must be a CSV file. Your file must contain column headers. It is important that the headers are not duplicated, blank or contain spaces.
Choose a file to upload:
Browse...
Upload File
Progress Bar:
Cancel
Back
Next
Done

Once you have uploaded the file a preview window will appear shown in the example below so you can verify the data will be uploaded correctly.


Step 4 Data upload
It is now time to upload your campaign data this must be a CSV file. Your file must contain column headers. It is important that the headers are not duplicated, blank or contain spaces.
Choose a file to upload:
Browse...
Upload File
Progress Bar:
Preview of file:
A B C D
1 Title First_Name Surname Telephone
2 Mr Nick Holland 2075798111
3 Mr Keith Harbison 1733240807
4 Mr David Swift 7702345777
Cancel
Back
Next
Done

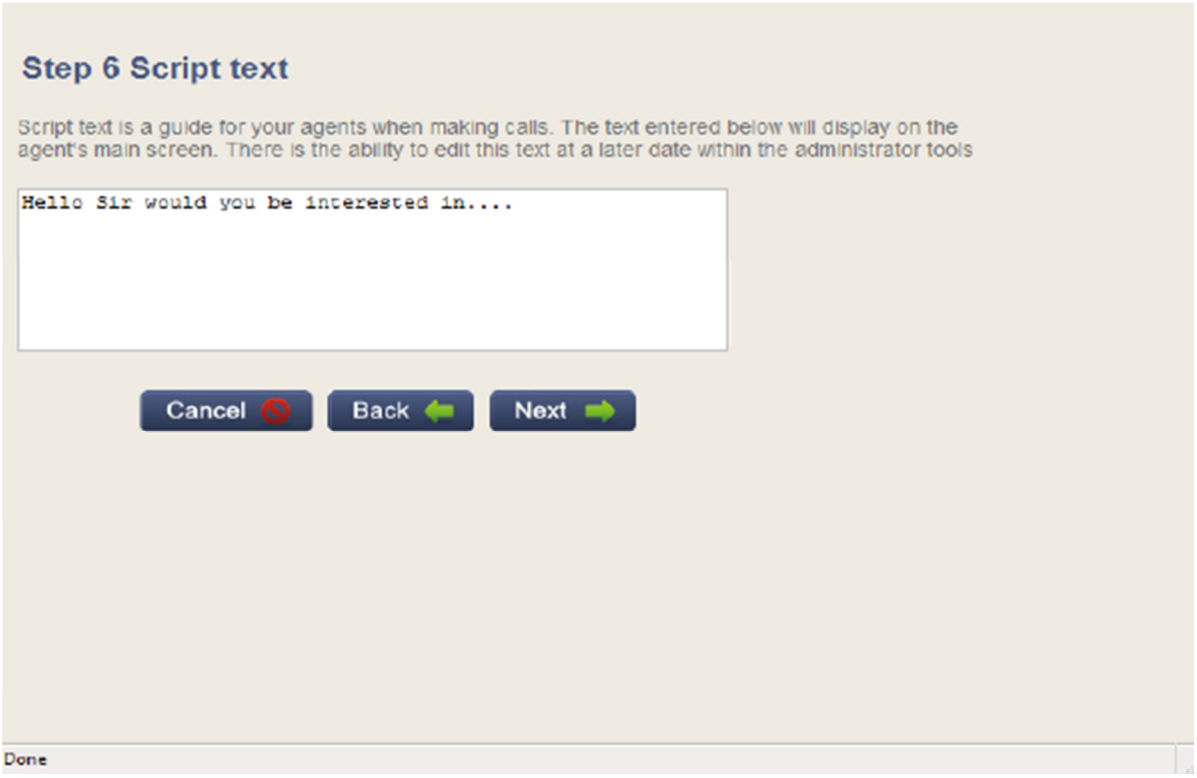
Step 5 Field matcher

This step is used to match your data with easycallnow's fields; ensuring data is displayed correctly to the agents. Any matching field names will be automatically assigned, others can be selected from the drop down lists. Any unassigned fields will still be displayed on the main agent calling screen just it no particular order.


Step 5 Field matcher
We have automatically assigned standard fields where your field names match ours. This will enable our system to recognise and display your data correctly. Please assign remaining fields to our standard fields where appropriate. Please ensure that you have at least one phone number field matched to continue. Any unassigned fields will still display on the agent screen
Your fields
Standard field
Title
Title
First_Name
--- Select --
Surname
--- Select --
Telephone
--- Select --
Cancel
Back
Next
Done

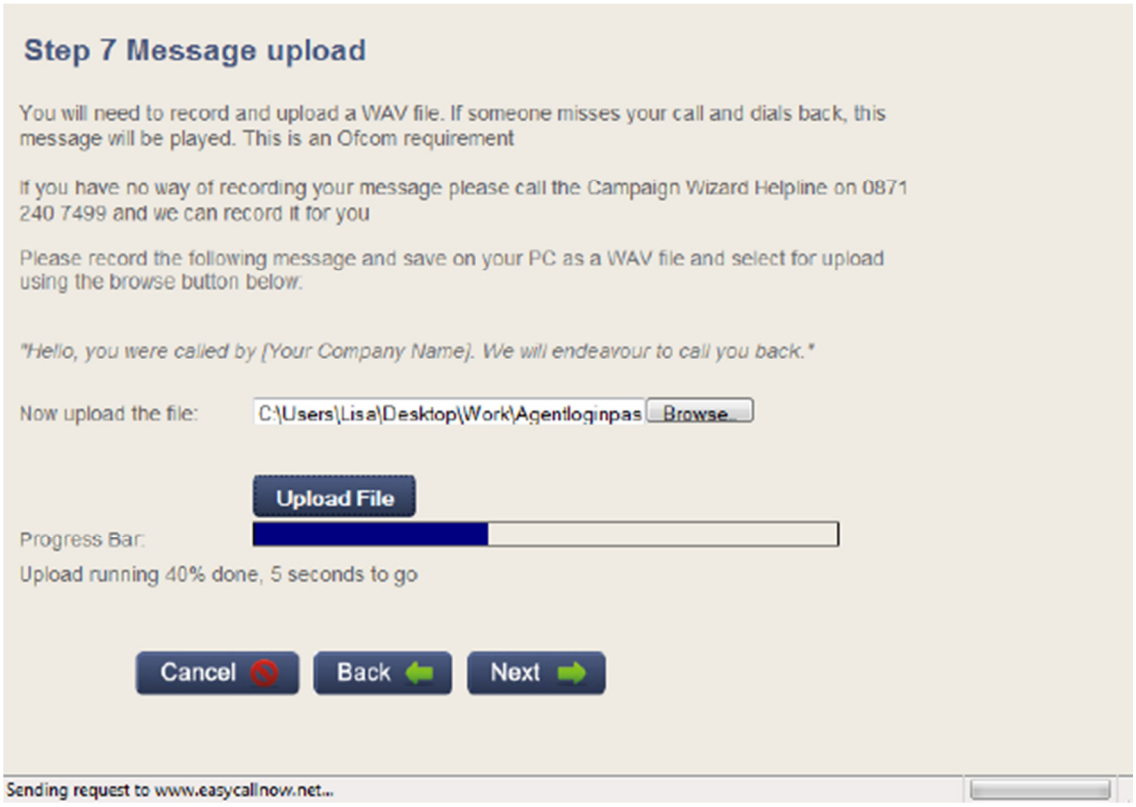
Step 6 Script Text

This text is a prompt for you agents when calling, you can type whatever prompts the agents may require when calling.


Step 6 Script text
Script text is a guide for your agents when making calls. The text entered below will display on the agent's main screen. There is the ability to edit this text at a later date within the administrator tools
Hello Sir would you be interested in....
Cancel
Back
Next
Done

Step 7 Message Upload

The message uploaded on this page will be played to a customer if they call your CLI after missing a call.

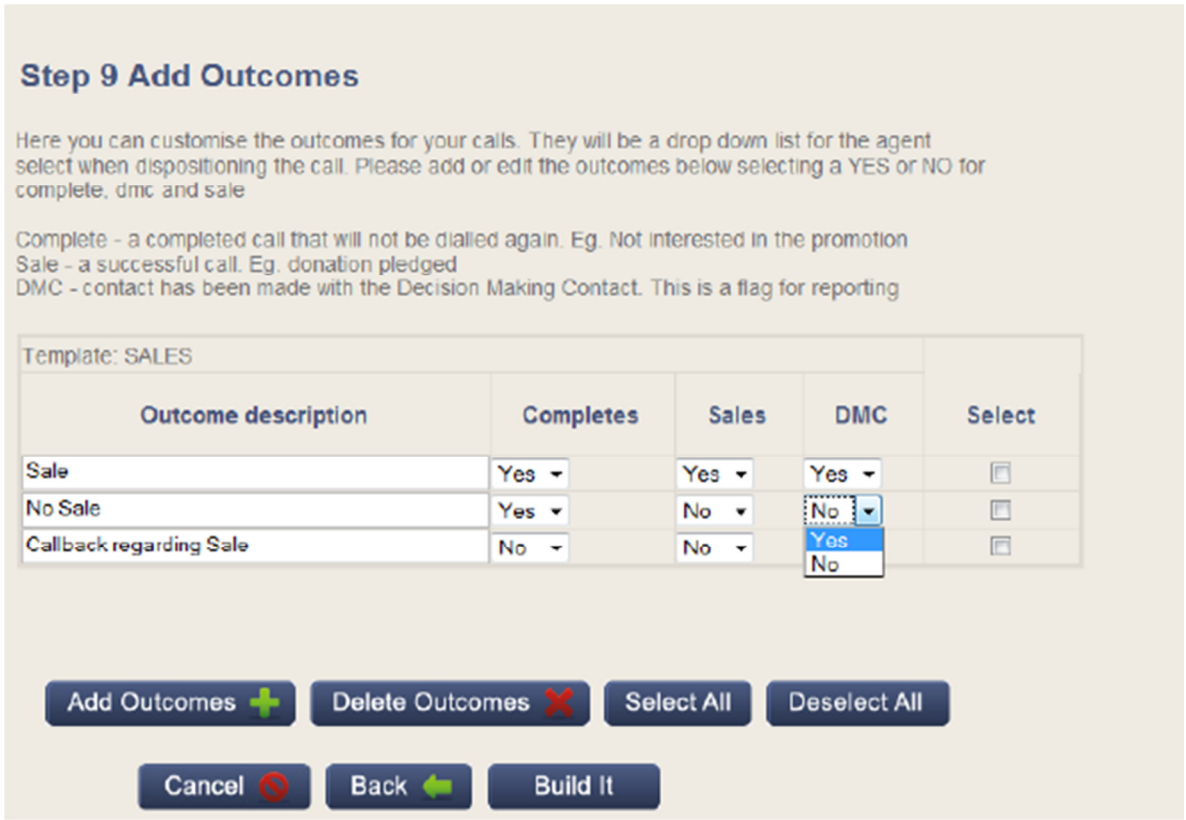

Step 7 Message upload
You will need to record and upload a WAV file. If someone misses your call and dials back, this message will be played. This is an Ofcom requirement
If you have no way of recording your message please call the Campaign Wizard Helpline on 0871 240 7499 and we can record it for you
Please record the following message and save on your PC as a WAV file and select for upload using the browse button below.
"Hello, you were called by [Your Company Name]. We will endeavour to call you back."
Now upload the file:
C:\Users\Lisa\Desktop\Work\Agentloginpas
Browse...
Upload File
Progress Bar:
Upload running 40% done, 5 seconds to go
Cancel
Back
Next
Sending request to www.easycallnow.net...

Step 8 Add agents

Add agents by assigning them a username and password, this can also be done or edited at a later date using the administrator tools provided.

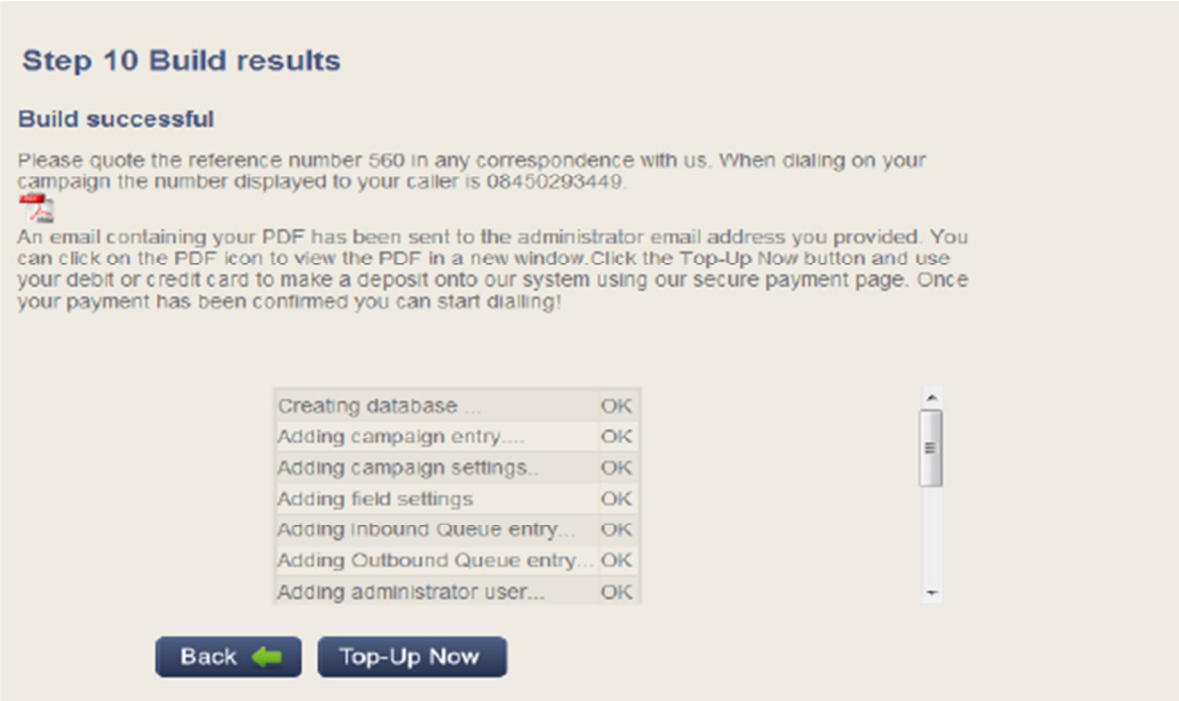
Step 9 Add Outcomes

This step allow you to customise outcome codes (calling codes / dispositions) for the agent script they can also be modified or added later using the administrator tools provided.


Step 9 Add Outcomes
Here you can customise the outcomes for your calls. They will be a drop down list for the agent select when dispositioning the call. Please add or edit the outcomes below selecting a YES or NO for complete, dmc and sale
Complete - a completed call that will not be dialled again. Eg. Not interested in the promotion
Sale - a successful call. Eg. donation pledged
DMC - contact has been made with the Decision Making Contact. This is a flag for reporting
Template: SALES
Outcome description
Completes
Sales
DMC
Select
Sale
Yes
Yes
Yes
No Sale
Yes
No
No
Yes
No
Callback regarding Sale
No
No
Add Outcomes
Delete Outcomes
Select All
Deselect All
Cancel
Back
Build It

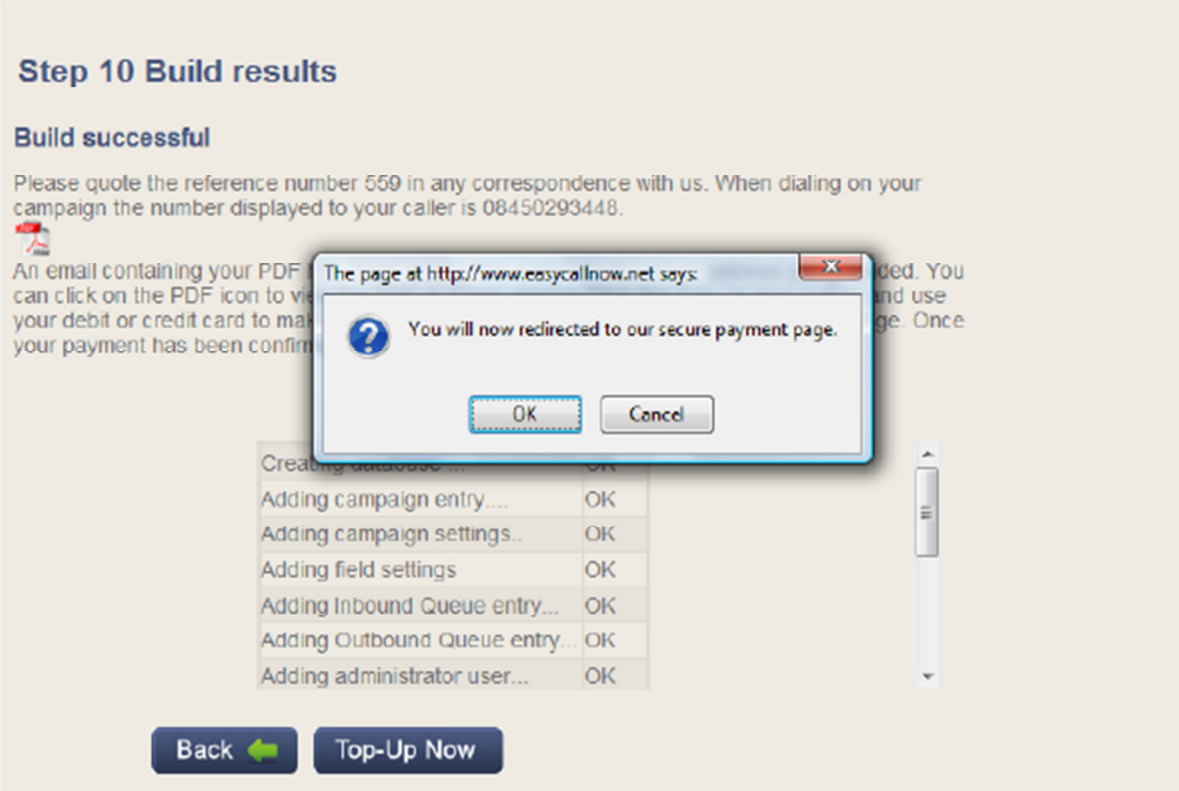
Step 10 Build results

Your CLI for the campaign is provided in step 10, at this point an automated email is sent to the email address provided containing all campaign information required. There is also a link at the bottom of this step which takes you to the secure payment screen (Top-Up now).

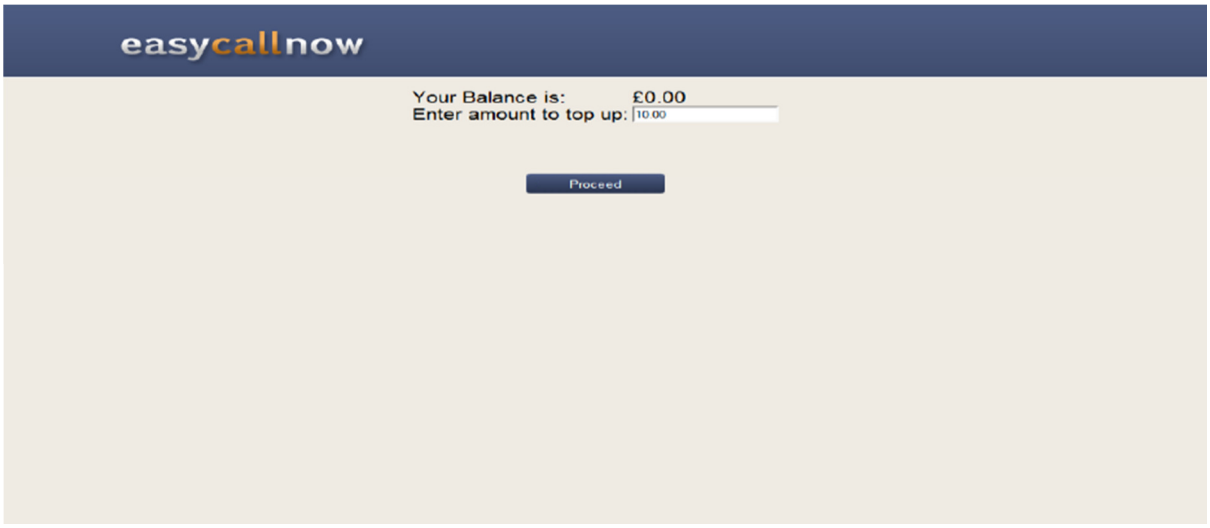

Step 10 Build results
Build successful
Please quote the reference number 560 in any correspondence with us. When dialing on your campaign the number displayed to your caller is 08450293449.
An email containing your PDF has been sent to the administrator email address you provided. You can click on the PDF icon to view the PDF in a new window.Click the Top-Up Now button and use your debit or credit card to make a deposit onto our system using our secure payment page. Once your payment has been confirmed you can start dialling!
Creating database ... OK
Adding campaign entry..... OK
Adding campaign settings.. OK
Adding field settings OK
Adding Inbound Queue entry... OK
Adding Outbound Queue entry... OK
Adding administrator user... OK
Back
Top-Up Now

Campaign Top –UP

Adding credit to the campaign can be done by clicking on the top-up now button located on the bottom of step 10 this will transfer you to our secure payment page

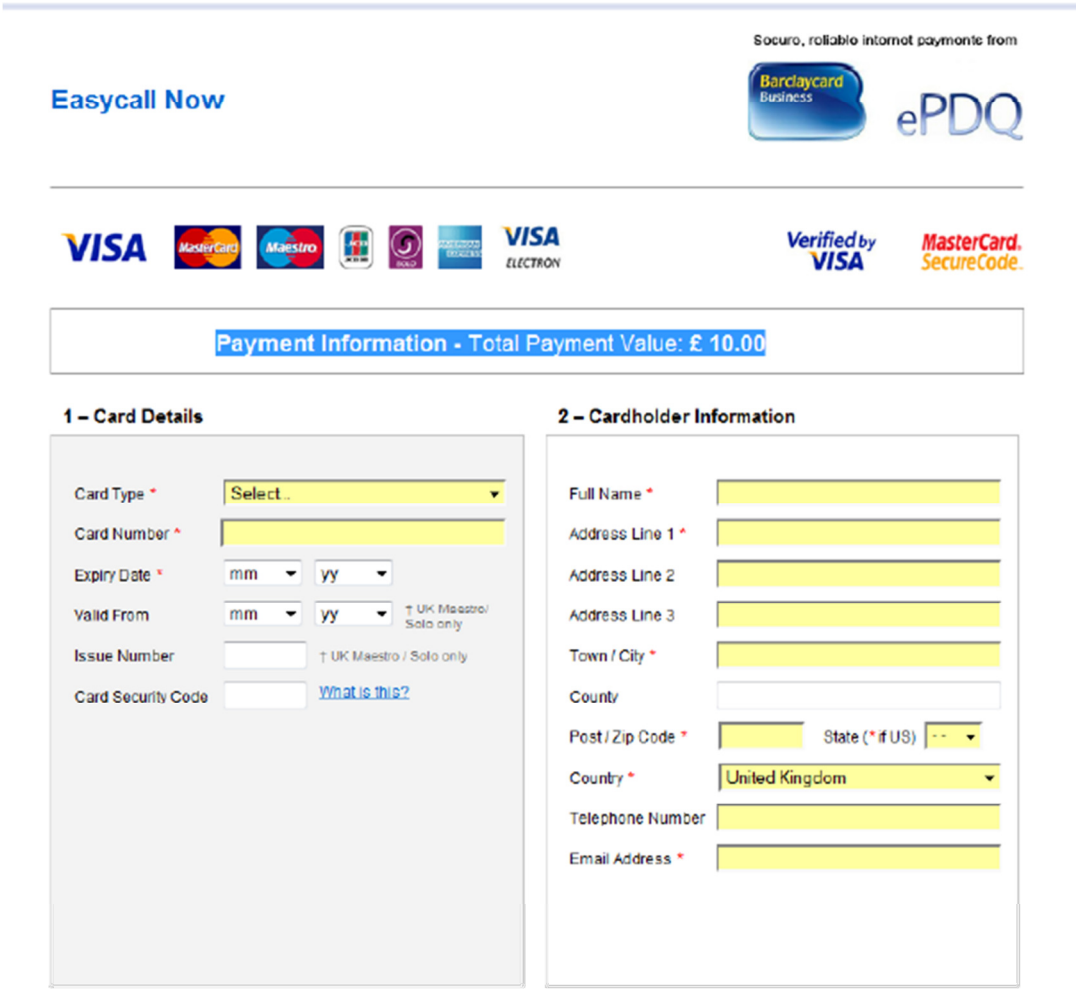

Step 10 Build results
Build successful
Please quote the reference number 559 in any correspondence with us. When dialing on your campaign the number displayed to your caller is 08450293448.
The page at http://www.easycallnow.net says:
You will now redirected to our secure payment page.
OK
Cancel
Adding campaign entry..... OK
Adding campaign settings.. OK
Adding field settings OK
Adding Inbound Queue entry... OK
Adding Outbound Queue entry... OK
Adding administrator user... OK
Back
Top-Up Now

When topping up you first need to enter the amount you would like to credit the campaign with, your current balance is displayed here for your reference.



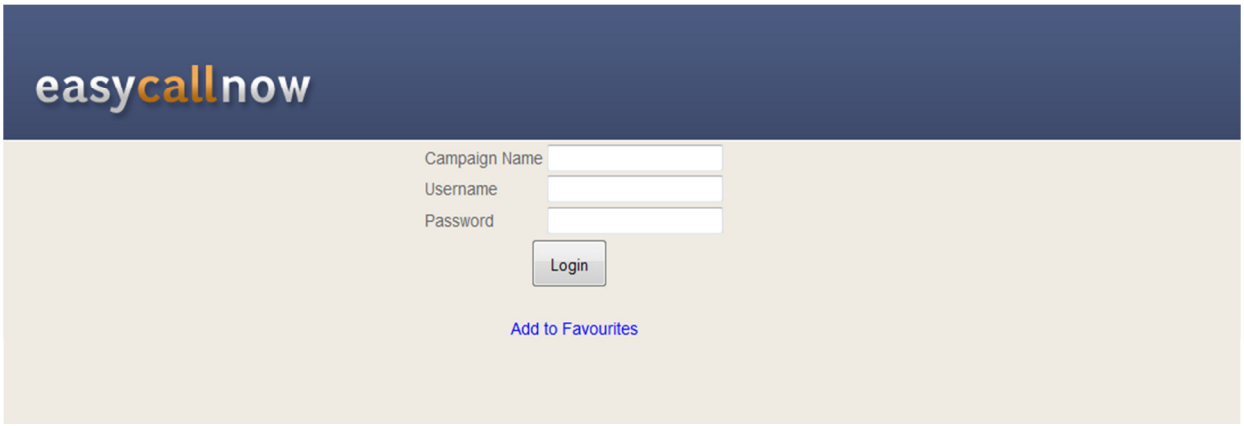
Secure payment page

Once you have decided on an amount you will be required to enter you card details and card holder information. Credit can also be added to a campaign at a later date via the campaign using the administrator tools provided; a link to the secure payment site is located in the top right hand corner of all the administration screens.

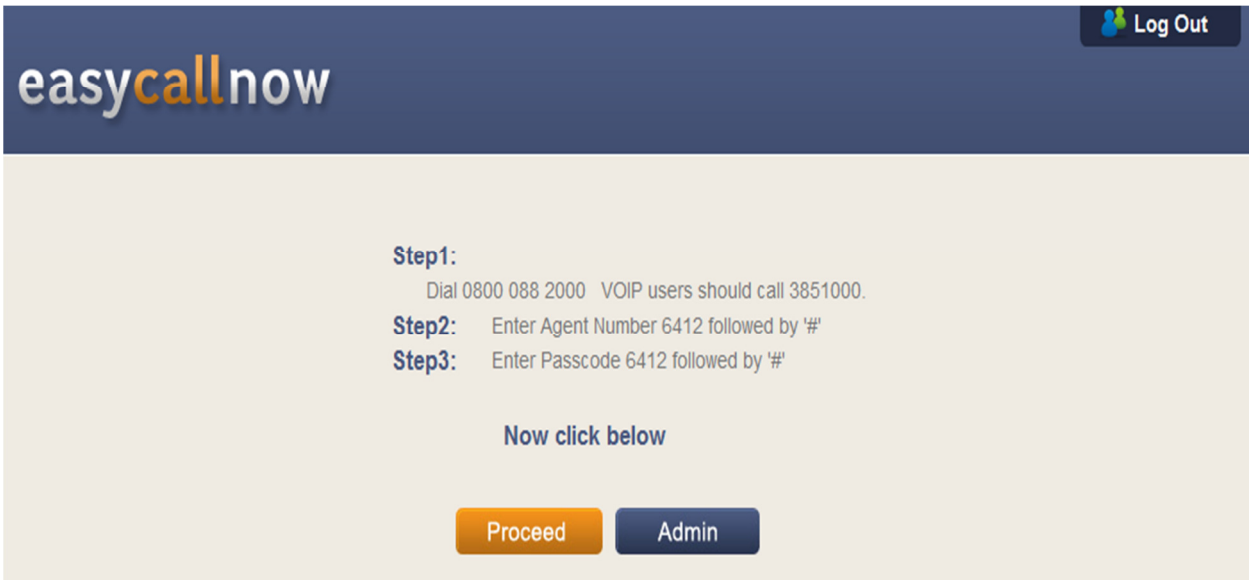


System Login

Once the account is credited you are diverted back to the easycallnow home page were you can login to your campaign, this is done by entering you campaign name, username and password into the boxes provided at the top left hand side of the homepage, simply click the Login icon to the right of the information boxes to get started.



Once this is successful the next page you will see is below, here you have the option to either Proceed – which will begin taking calls or select Admin – This will take you to the administrator menus.



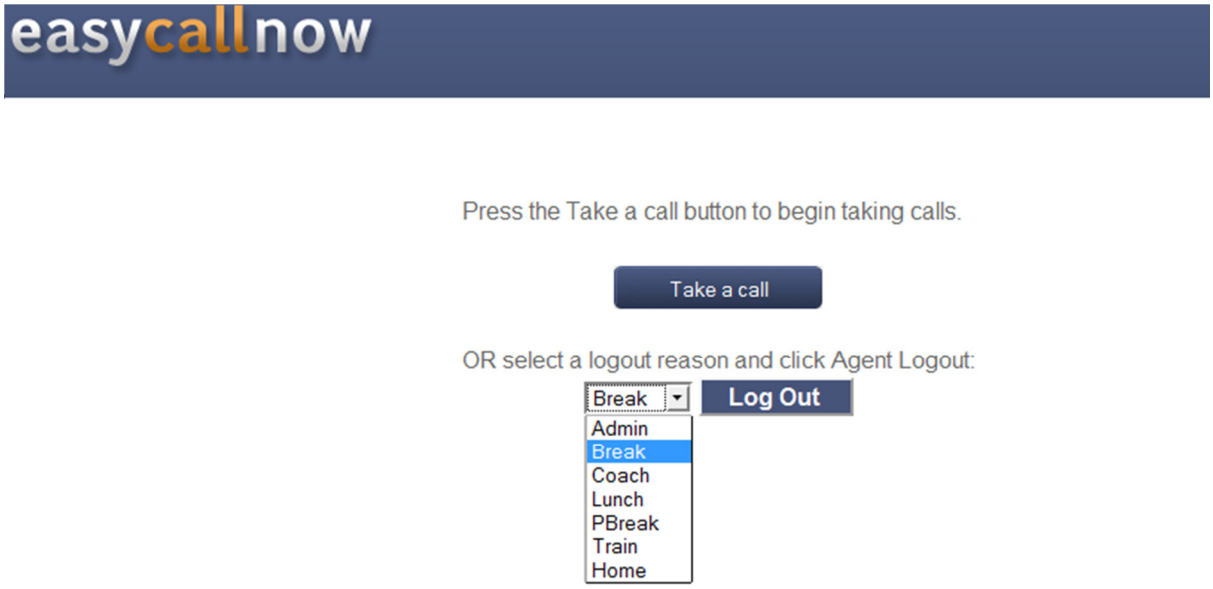
Begin Taking calls

Wrap screen

After selecting to proceed on the login screen (shown above) you will come to the wrap screen, wrap is when you are logged in but not taking calls idol time.
This screen has two options;

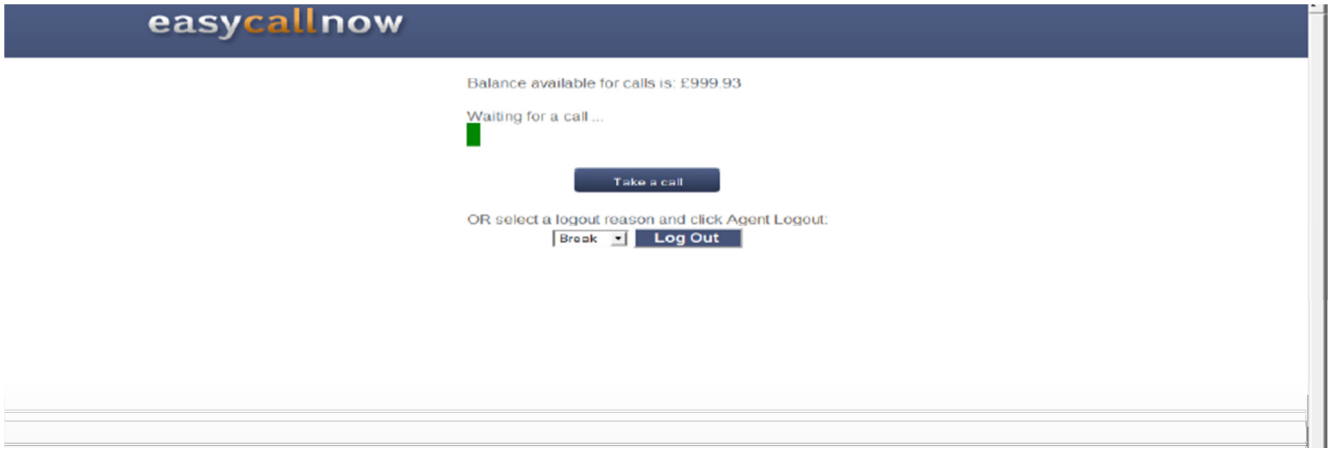
Take a call – which will start easycallnow dialling your campaign data provided.

Logout – When selecting logout, you must first ensure you have chosen the right reason code from the box located on the left of the button. This is important as it effects the information displayed in the reports provided.



Wait screen

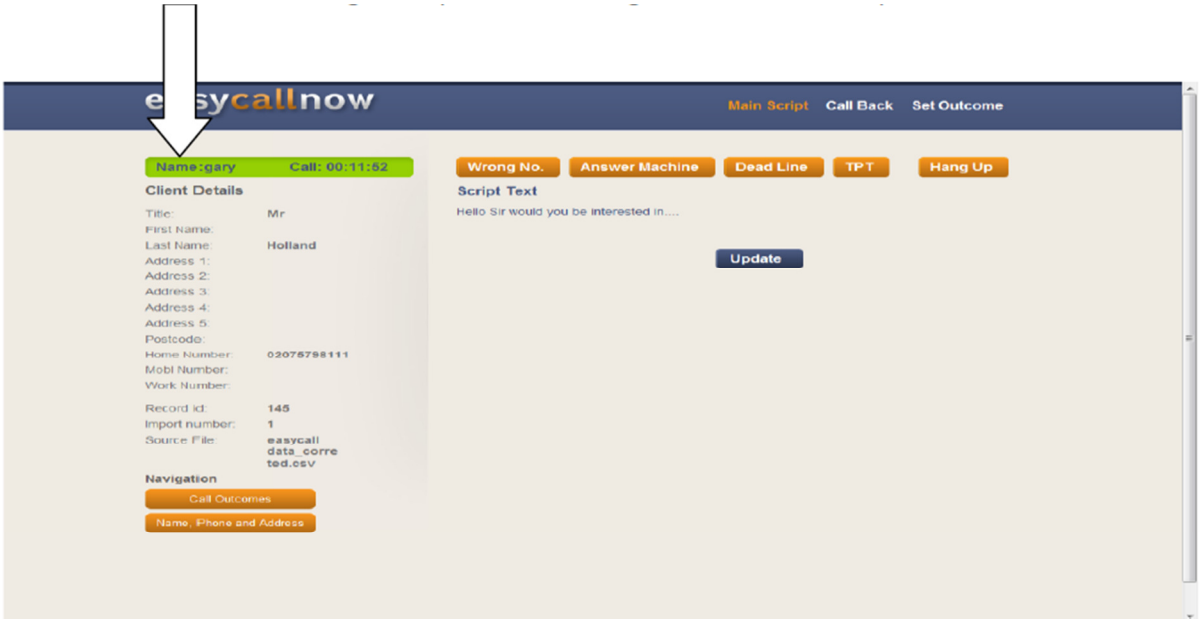
This is the screen the agent will see when waiting to be connected to a call



Agent Script

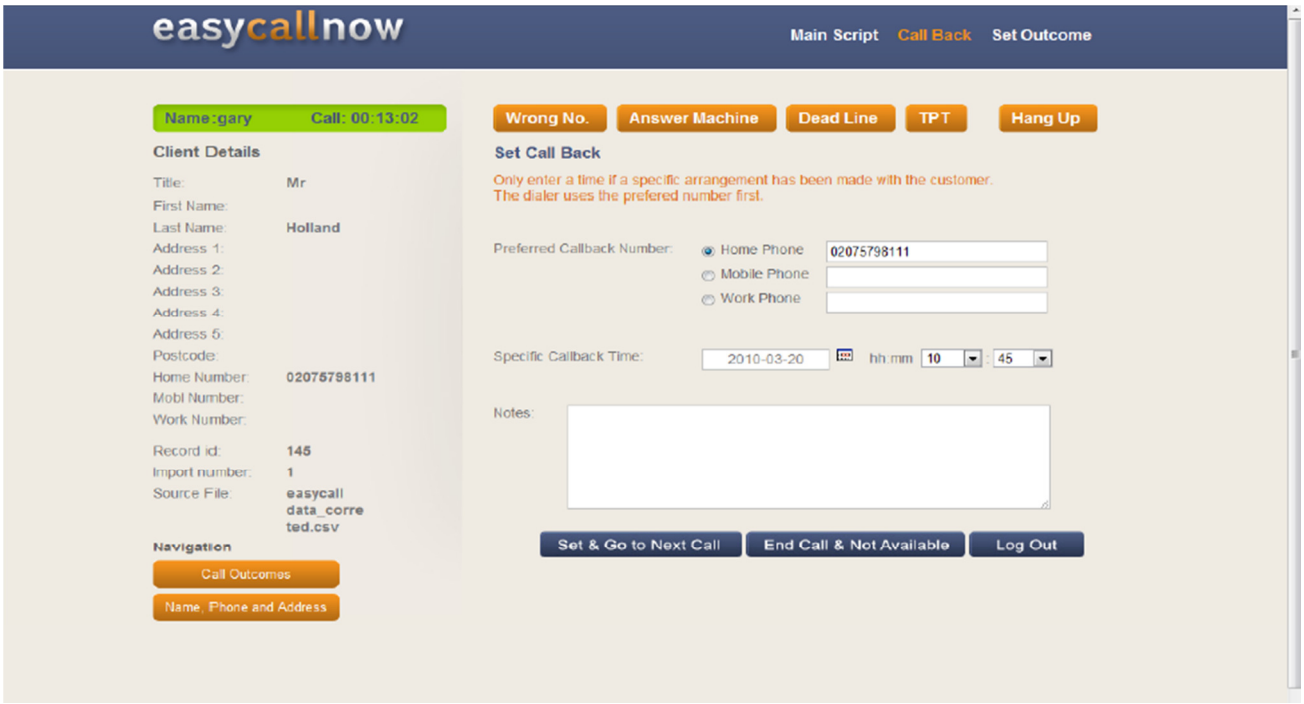
Agent main script screen

When a call is connected below is the first screen displayed to the agent.
Depending on the data you have loaded determines how the customer information will be displayed down the left hand side. Along the top are three navigation links Main script, Call-back, Set outcomes.



Navigation links

Call-backs



The above screen is viewed when an agent selects the call back navigation link from the top right hand side of the script. Here the agent has the option to set a call back, a date and time can be entered for the call along with the selection of a preferred contact number. Once this information is complete the agent then needs to end the call by selecting one of the three end call option buttons in blue at the bottom of the script.

Notes

A notes field is located on the call back screen within the bottom half, as seen above. It can be used for adding relevant notes about a customer.

End call Options

The end call options are located on all the screens when setting an outcome for a call. There are three blue buttons with the following functions, one of which must be selected each time you complete a call

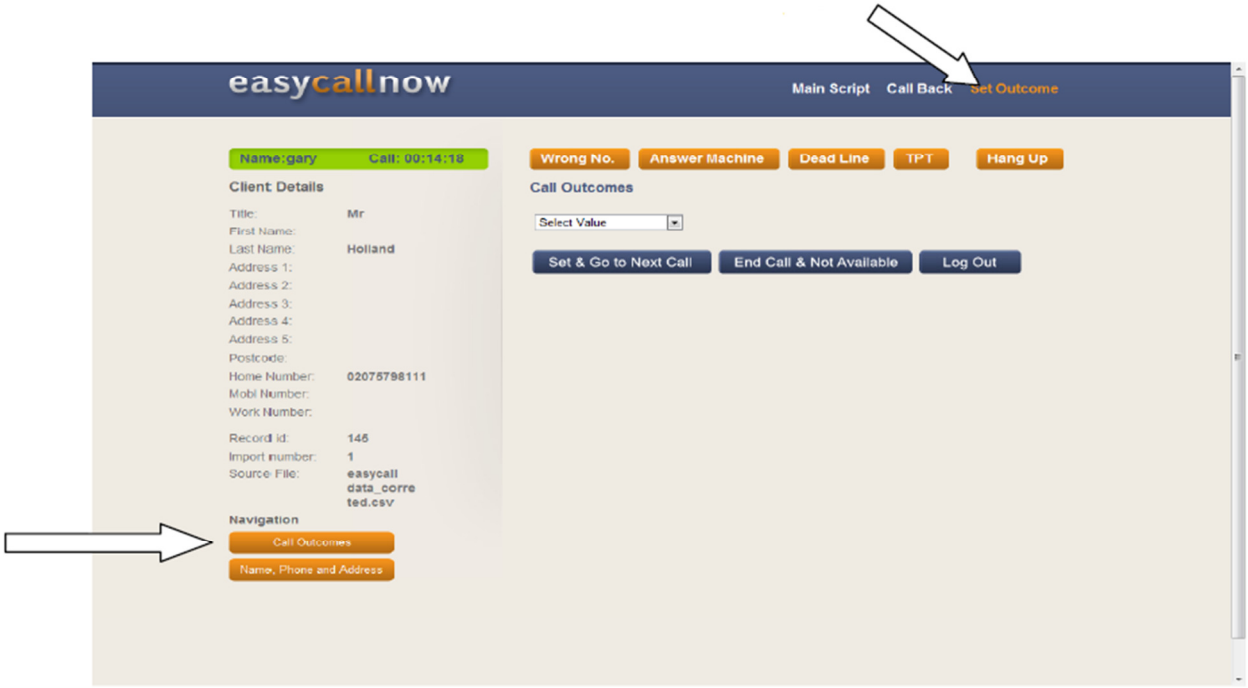
Set & Go to next call – This will take the agent to the wait screen for another call

End call & Not available – This will place the agent into wrap status and they will remain idol until they select either a reason code and logout or select to take a call

Logout – This will log the agent out

Set Outcome

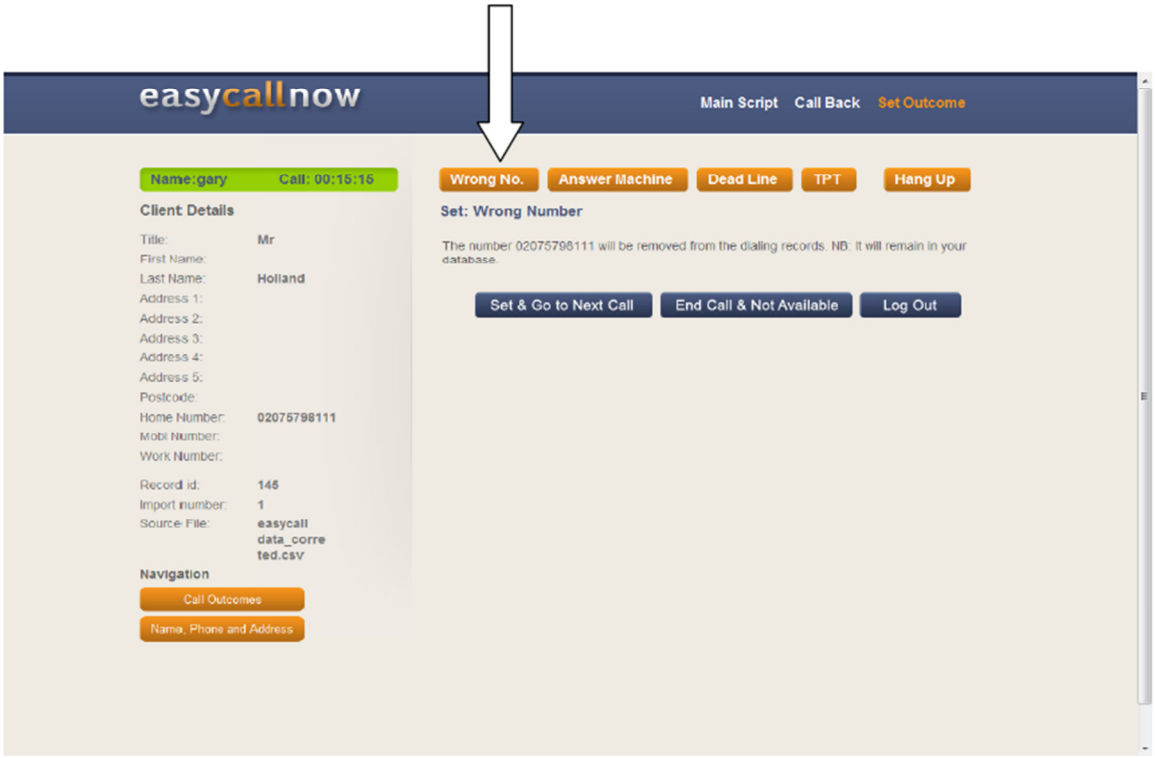
The call outcomes selection can be accessed from two ways the navigation link in the top right hand corner of the script or the orange button in the bottom left corner.



Both will take the agent to the same screen allowing them to select and outcome and then one of the end call options.

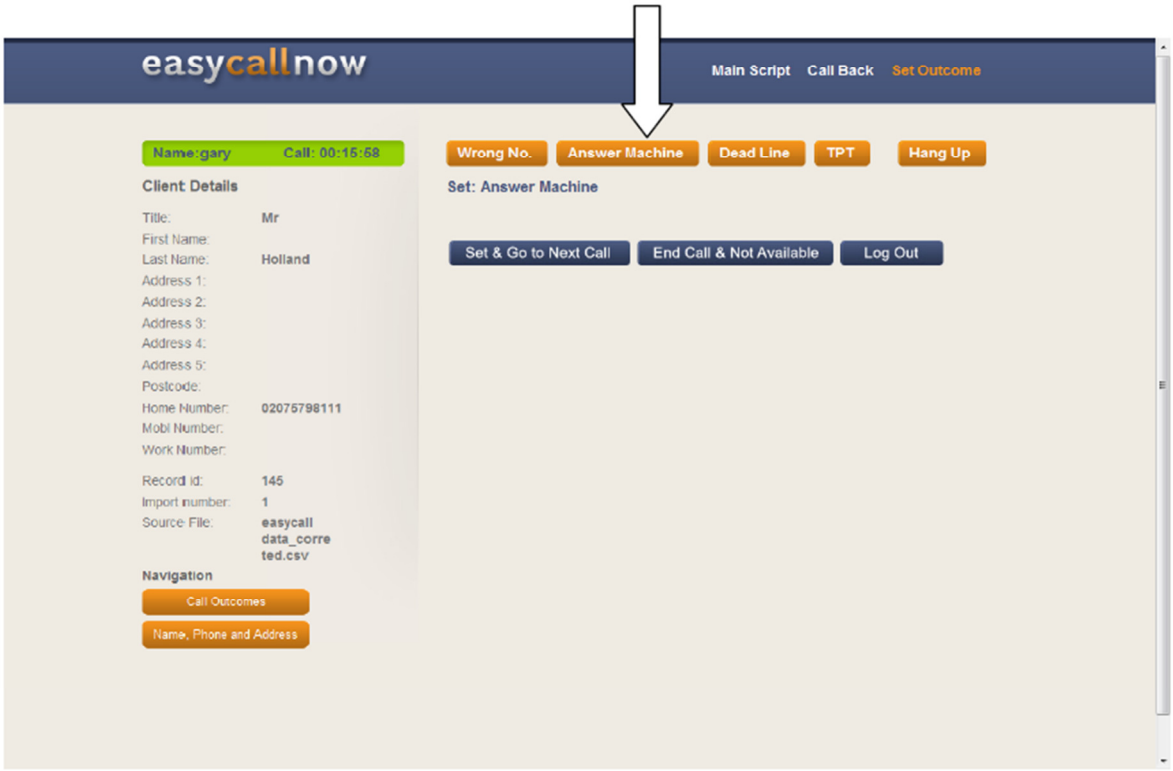
Wrong Number button

This button is a quick way to set the outcome to wrong number the button can be clicked and then select an end call option. (BLUE BUTTONS)



Answer Machine button

The answer machine button seen below can selected as a quick clear way of setting the call to answer machine. Simply selected the button followed by an end call option (BLUE BUTTONS).



Dead Line button

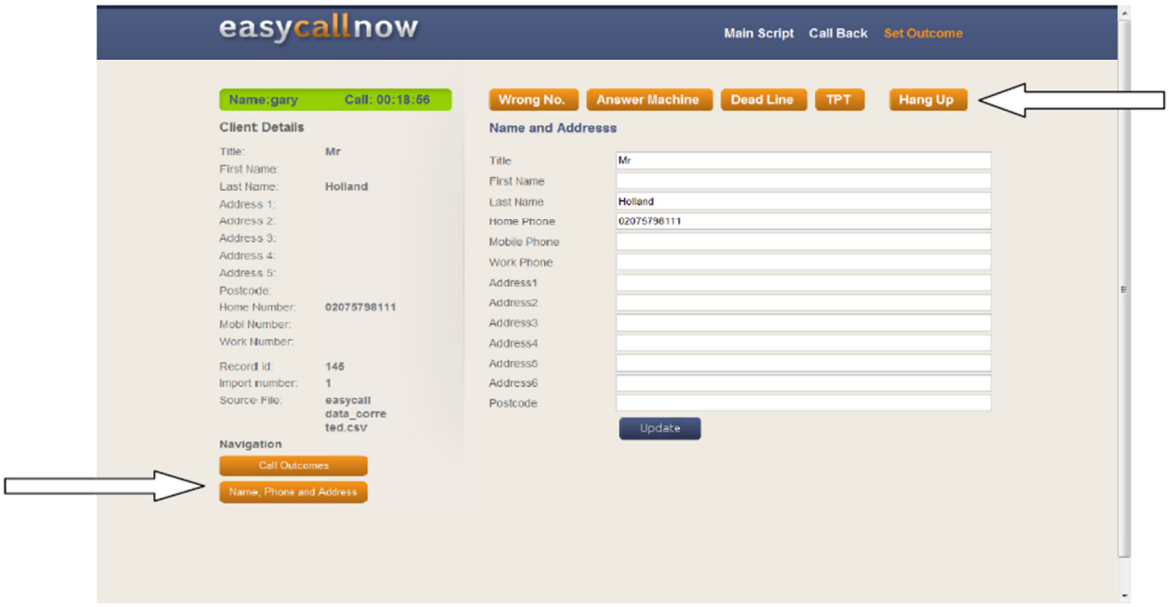
The Dead line button seen below can be selected as a quick clear way of setting the call outcome to and dead line. Simply selected the button followed but an end call option. (BLUE BUTTONS)

Editing customer information

The screen below can be viewed by selecting the Name phone and address button located on the bottom left hand side of the script.

This screen allows the agent to edit or amend customer information and update the data by clicking on the blue update button when complete.

When the agent has finished editing the customer information an outcome and end call option must still be selected to successfully complete the call.

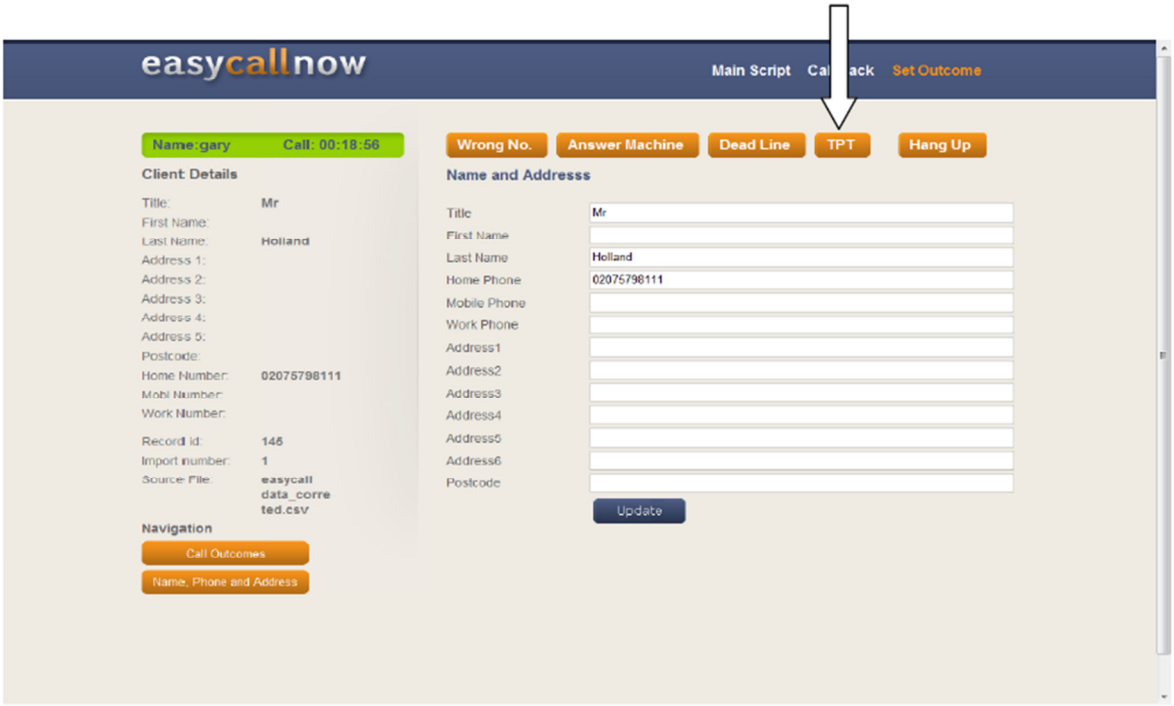


Hang Up button

The hang up button is located in the top right corner of the script, this button allows the agent to end the customer side of the call but still leave there screen open to edit notes or information before setting the appropriate outcome code and end call option.

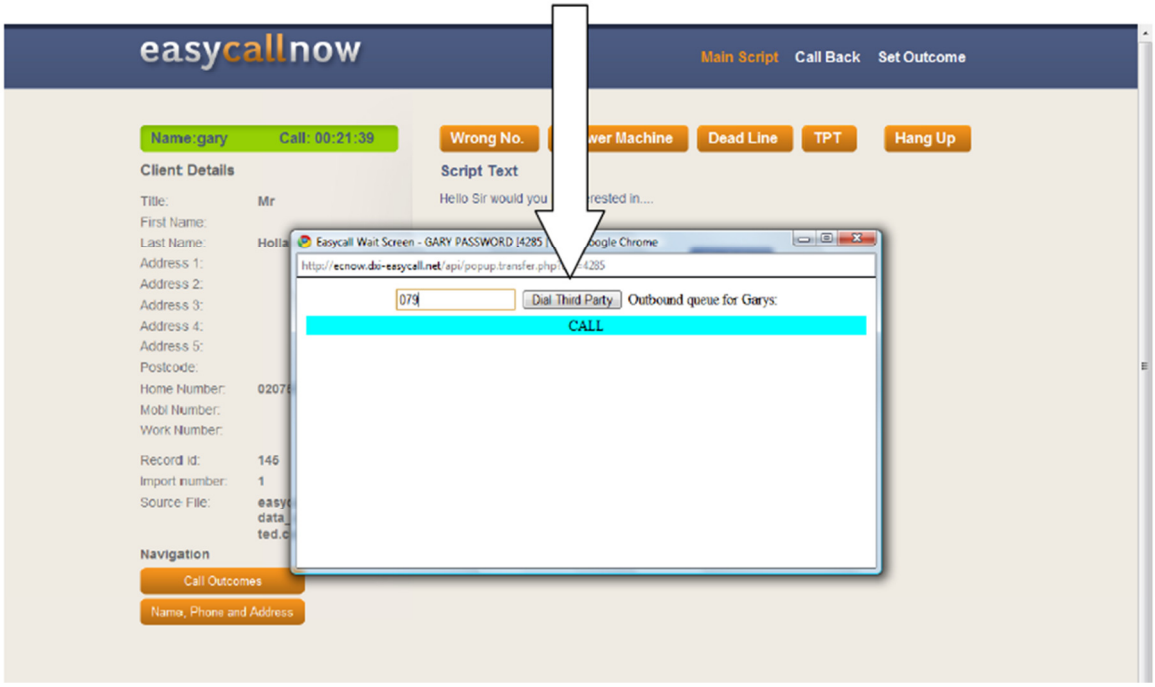
Transfer Facility

Third party transfers can be done by clicking the TPT button located along the top of the script. This will open a pop up window with transfer control.

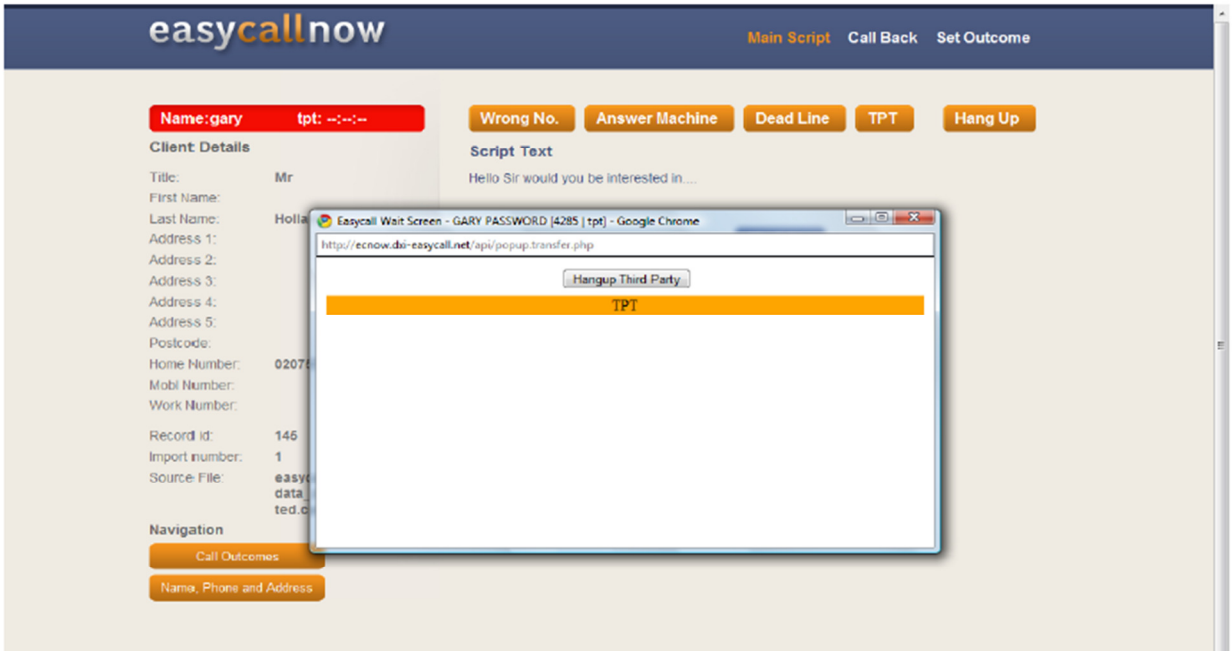


The transfer window allows the agent to enter the phone number for the third party transfer, then click dial third party.

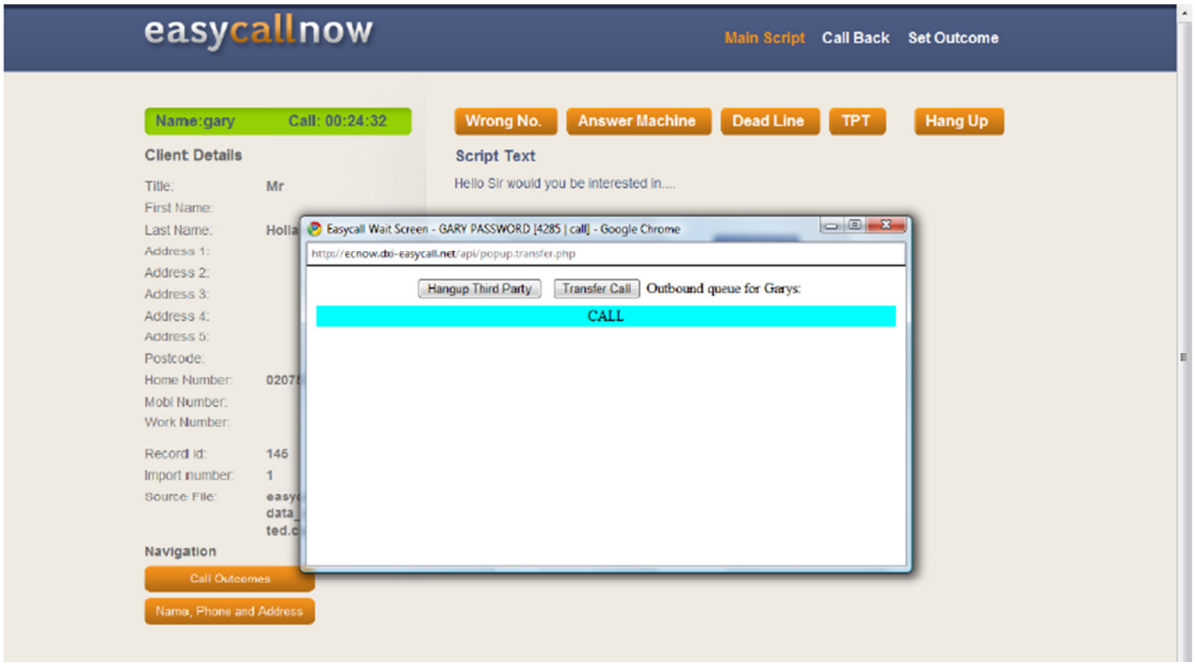
This will place the customer on hold and dial the third party, allowing the agent and third party to establish relationship before transferring the customer.



Whilst the system is dialling the third party this is the screen the agent will view.

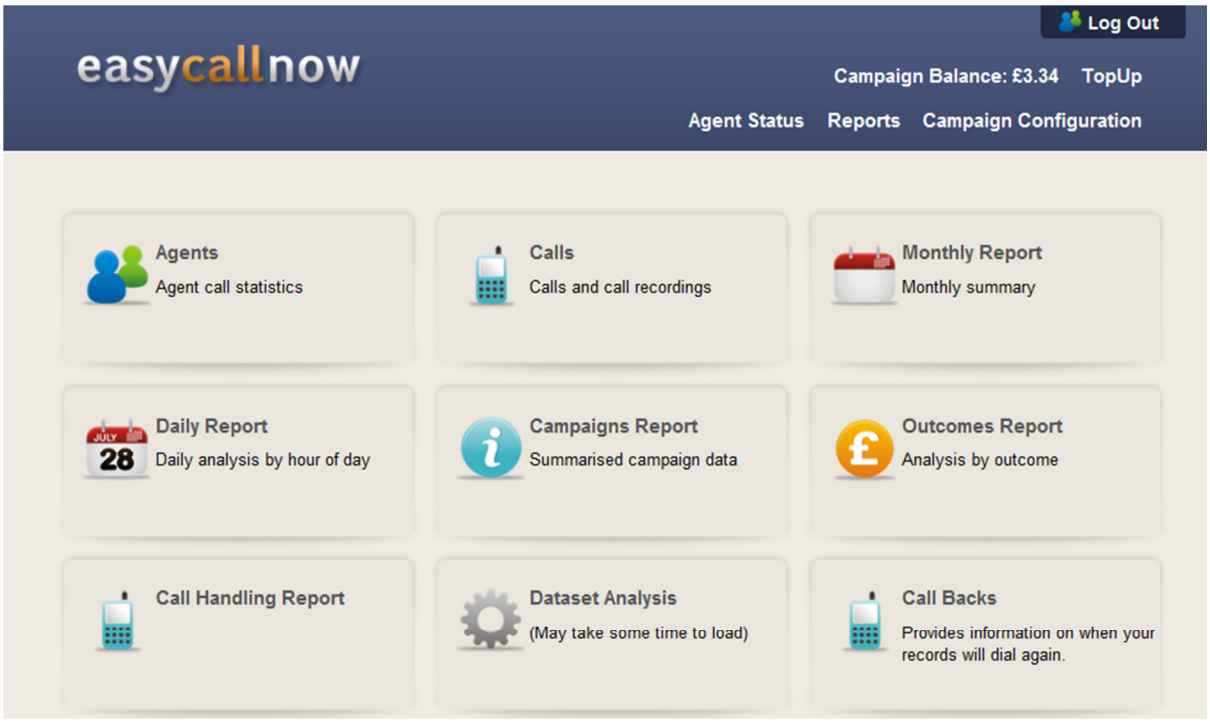


Once the third party is connected the agent has the option to transfer the customer to third party or hang up third party call and resume call with customer.



After the transfer is complete the agent then need to set an outcome for the call.

Administrator Tools
Reports

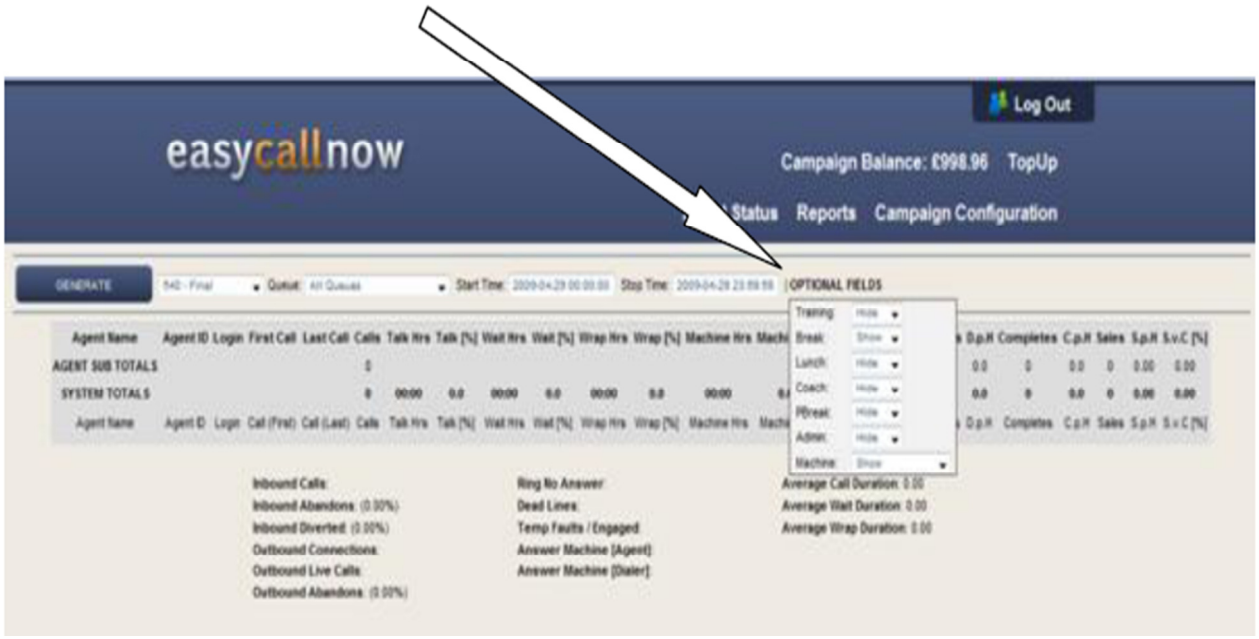


Each of the reports has a selection of variables along the top that allow the administrator to select the date, time range for the report to be run. Some of the reports also have the option to select a particular agent or outcome code to make the report more unique.
Once the variables have been decided the GERERATE button needs to be clicked for the report to process

Agent report

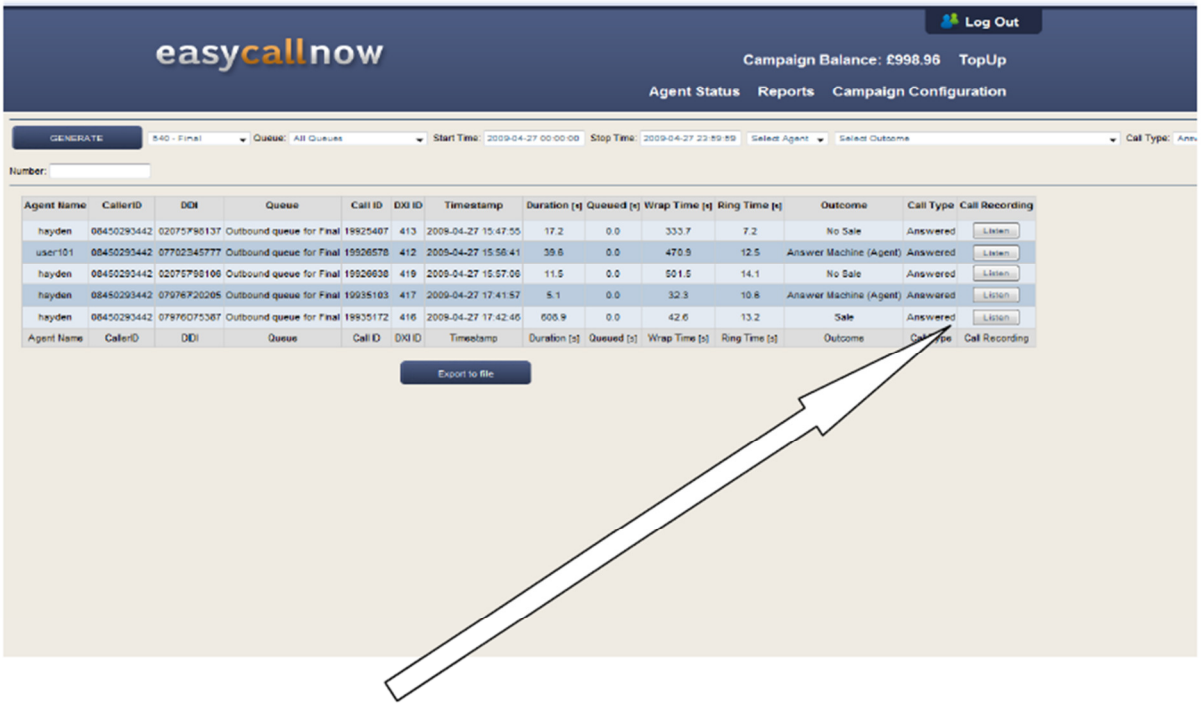
The agent report shows a list of statistics for each individual. Their agent ID the time they logged in, took their first call, when they logged out, how many calls they have taken and the time that they have spent on the phone logged in, talking and also waiting for calls. The overall figures are calculated at the bottom to give a total for all agents.
The report shows how many sales are made and by which agents and also gives a sales verse completes (S.v.C) ratio, along with a sales per hour (S.p.H) completes per hour (C.p.H) and DMC's per hour (D.p.H) figures.

The report also has the averages for the date selected in the bottom left corner, along with a summary for the calling data (Shown above)
There is also an OPTIONAL FIELDS section, which gives you the option to include logout reasons such as training time, breaks lunch etc.



Calls report

The calls report will show a list of all calls made during the specified duration, supplying the time and date of the call along with the outcome and the agent who took the call.


easycallnow
Log Out
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
GENERATE
Number:
Agent Name CallerID DDI Queue Call ID DXI ID Timestamp Duration [s] Queued [s] Wrap Time [s] Ring Time [s] Outcome Call Type Call Recording
hayden 08450293442 02075795137 Outbound queue for Final 19925407 413 2009-04-27 15:47:55 17.2 0.0 333.7 7.2 No Sale Answered Listen
user101 08450293442 07702345777 Outbound queue for Final 19926578 412 2009-04-27 15:56:41 39.6 0.0 470.6 12.5 Answer Machine (Agent) Answered Listen
hayden 08450293442 02075795106 Outbound queue for Final 19926630 419 2009-04-27 15:57:00 11.5 0.0 501.6 14.1 No Sale Answered Listen
hayden 08450293442 07976720205 Outbound queue for Final 19935103 417 2009-04-27 17:41:57 5.1 0.0 32.3 10.6 Answer Machine (Agent) Answered Listen
hayden 08450293442 07876075367 Outbound queue for Final 19935172 416 2009-04-27 17:42:46 606.9 0.0 42.6 13.2 Sale Answered Listen
Export to file

Call recordings

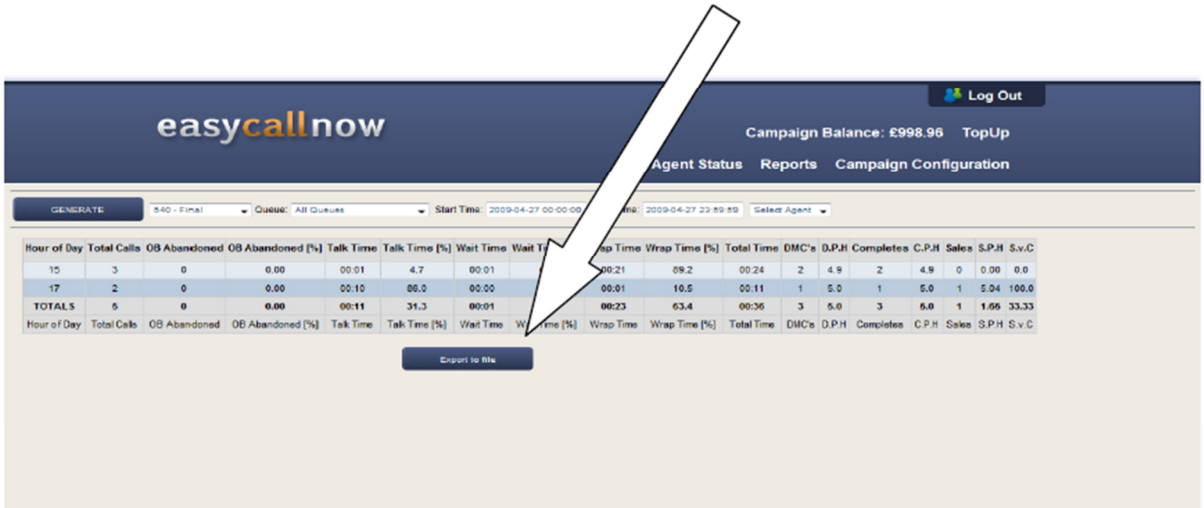
The calls report can also be used to search for a specified number to obtain the call recording. Once the desired call recording is located the recording can be listened to by clicking the LISTEN link on the right of the screen, if you right click on the link the recording can be saved to a desired location.

Monthly report

This report breaks down the months calling by date; it gives totals for calls, talk time, wrap time and sales. The report can be run over several months by editing the variables across the top of the report then GENERATE.

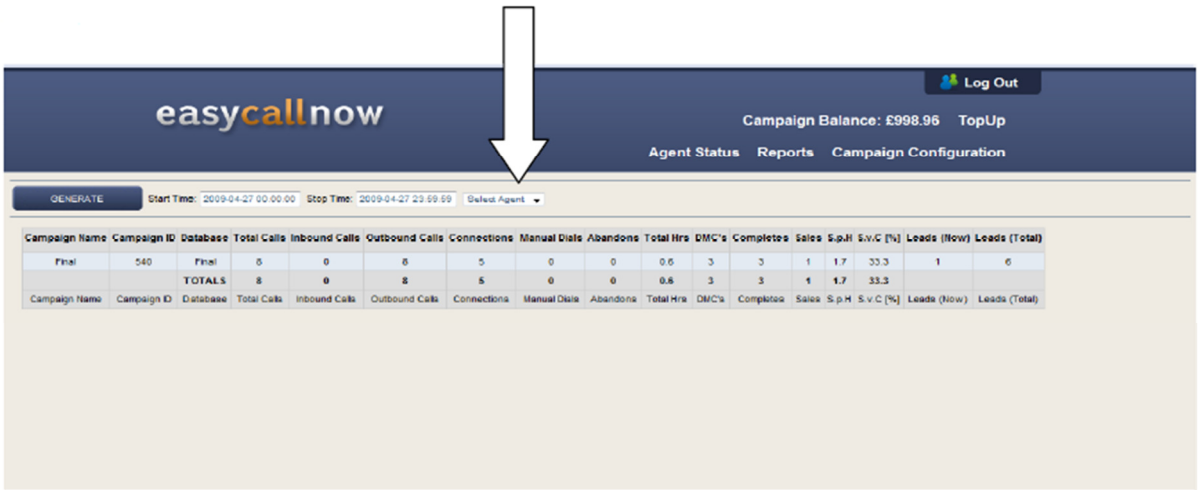
Daily report

This report breaks down the days calling by the hour; it gives totals for calls, talk time, wrap time and sales. The report can be run over several days by editing the variables across the top of the report. The information can also be exported to excel using the EXPORT TO FILE button at the bottom of the report.



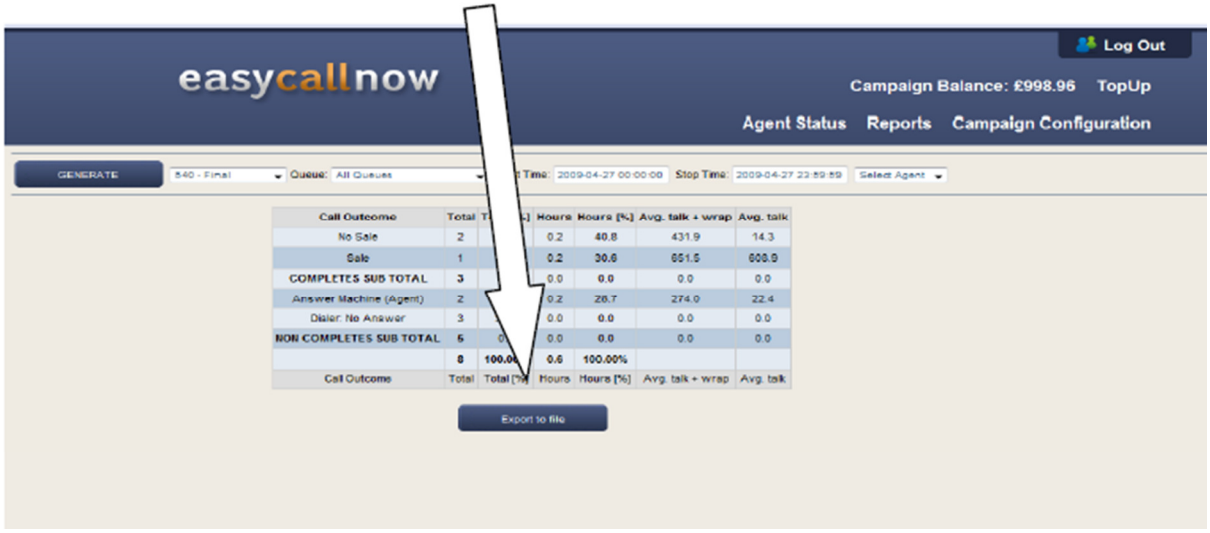
Campaign report

This report is a summary of the campaign data displaying totals for connections, manual dials and hours dialled. The report can be run on per agent bases and over different date ranges by changing the variables along the top of the report.


easycallnow
Log Out
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
GENERATE
Start Time: 2009-04-27 00:00:00
Stop Time: 2009-04-27 23:59:59
Select Agent
Campaign Name Campaign ID Database Total Calls Inbound Calls Outbound Calls Connections Manual Dials Abandons Total Hrs DMC's Completes Sales S.p.H S.v.C [%] Leads (Now) Leads (Total)
Final 540 Final 6 0 6 5 0 0 0.6 3 3 1 1.7 33.3 1 6
TOTALS 6 0 6 5 0 0 0.6 3 3 1 1.7 33.3
Campaign Name Campaign ID Database Total Calls Inbound Calls Outbound Calls Connections Manual Dials Abandons Total Hrs DMC's Completes Sales S.p.H S.v.C [%] Leads (Now) Leads (Total)

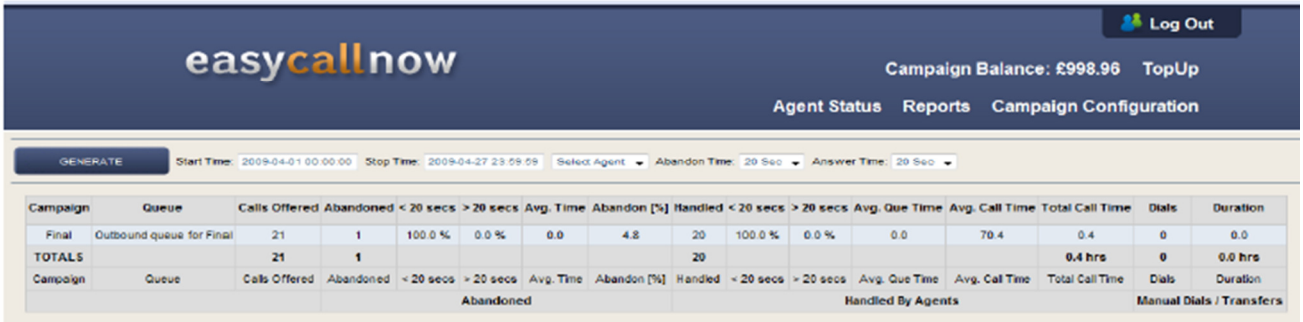
Outcomes report

This report produces a list of the totals for the outcomes selected by the agents so far, with calculations such as percentages of the total outcomes and the average talk time spent on a particular outcome. This report can be used to overview a particular dataset and the outcomes which the agents have produced from it. This report can also be exported to excel using the blue button at the bottom of the screen.


easycallnow
Log Out
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
GENERATE
540 - Final
Queue: All Queues
Start Time: 2009-04-27 00:00:00
Stop Time: 2009-04-27 23:59:59
Select Agent
Call Outcome Total Hours Hours [%] Avg. talk + wrap Avg. talk
No Sale 2 0.2 40.8 431.9 14.3
Sale 1 0.2 30.6 651.5 600.9
COMPLETES SUB TOTAL 3 0.0 0.0 0.0 0.0
Answer Machine (Agent) 2 0.2 26.7 274.0 22.4
Dialer: No Answer 3 0.0 0.0 0.0 0.0
NON COMPLETES SUB TOTAL 5 0.0 0.0 0.0 0.0
8 0.6 100.00%
Call Outcome Total Hours Hours [%] Avg. talk + wrap Avg. talk
Export to file

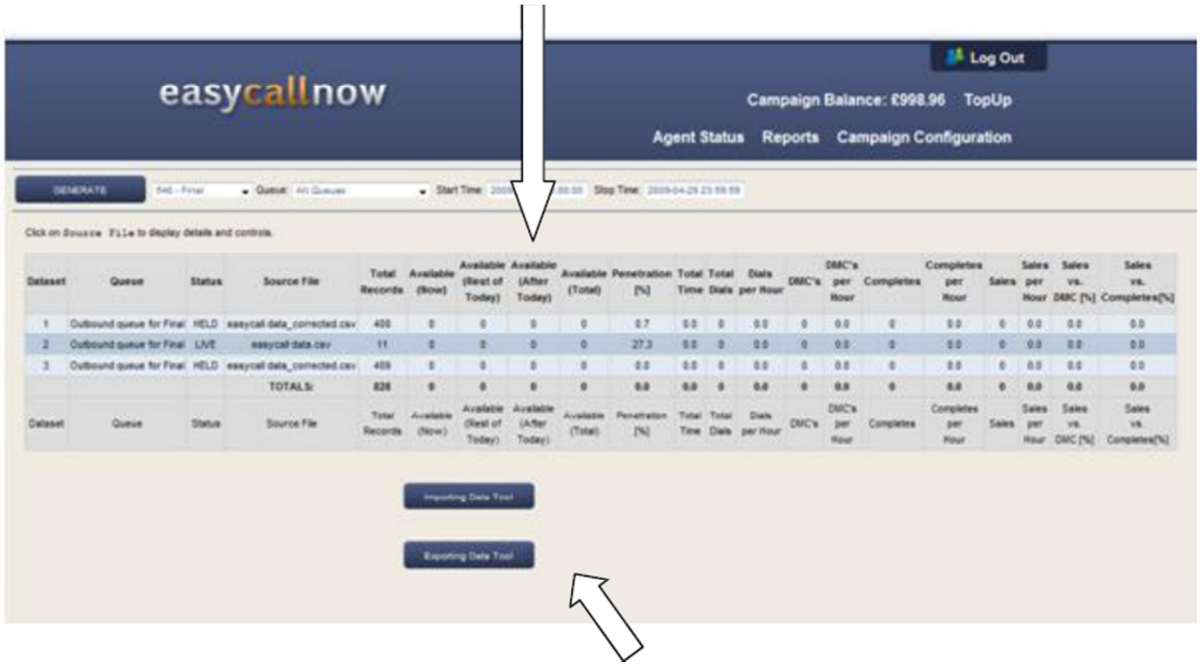
Call handling report

This report is broken down by calling statistics such as abandons, < 20sec and >20secs, dials and duration.


Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
GENERATE
Start Time: 2009-04-01 00:00:00
Stop Time: 2009-04-27 23:59:59
Select Agent
Abandon Time: 20 Sec
Answer Time: 20 Sec
Campaign Queue Calls Offered Abandoned < 20 secs > 20 secs Avg. Time Abandon [%] Handled < 20 secs > 20 secs Avg. Que Time Avg. Call Time Total Call Time Dials Duration
Final Outbound queue for Final 21 1 100.0 % 0.0 % 0.0 4.8 20 100.0 % 0.0 % 0.0 70.4 0.4 0 0.0
TOTALS 21 1 20 0.4 hrs 0 0.0 hrs
Campaign Queue Calls Offered Abandoned < 20 secs > 20 secs Avg. Time Abandon [%] Handled < 20 secs > 20 secs Avg. Que Time Avg. Call Time Total Call Time Dials Duration
Abandoned
Handled By Agents
Manual Dials / Transfers

Dataset analysis report

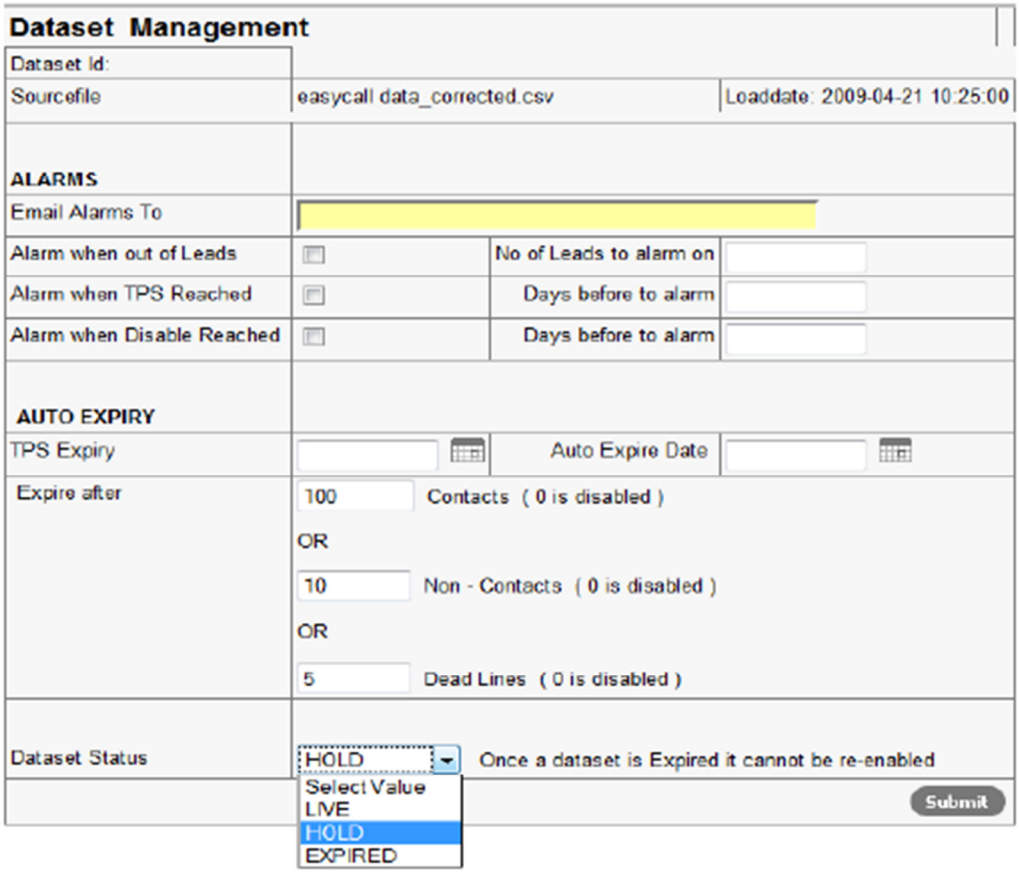
The Dataset report gives a list of all data that has been loaded for your campaign. It gives the data set id for each set of data and stats such as leads available now and contacts. At the bottom left of the page an overview of the leads and what is available now, today and after today is also available, this gives the supervisor the ability to manage the data effectively.


Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
GENERATE
Click on Source File to display details and controls.
Dataset Queue Status Source File Total Records Available (Now) Available (Rest of Today) Available (After Today) Available (Total) Penetration [%] Total Time Total Dials Dials per Hour DMC's DMC's per Hour Completes Completes per Hour Sales Sales per Hour Sales vs. DMC [%] Sales vs. Completes[%]
1 Outbound queue for Final HELD easycall data_corrected.csv 408 0 0 0 0 0.7 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0.0 0.0
2 Outbound queue for Final LIVE easycall data.csv 11 0 0 0 0 27.3 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0.0 0.0
3 Outbound queue for Final HELD easycall data_corrected.csv 409 0 0 0 0 0.0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0.0 0.0
TOTALS: 828 0 0 0 0 0.0 0.0 0 0.0 0 0.0 0 0.0 0 0.0 0.0 0.0
Importing Data Tool
Exporting Data Tool

From this screen you can also choose to import or export data, to do this simply click the relevant buttons on the screen below and follow the easy steps.

Dataset Management

By selecting the source file from the dataset analysis report (shown above) the data management screen below will display allowing the data to be changed from hold, live or expired. If expired is selected the data can never be reactivated.



Importing data tool

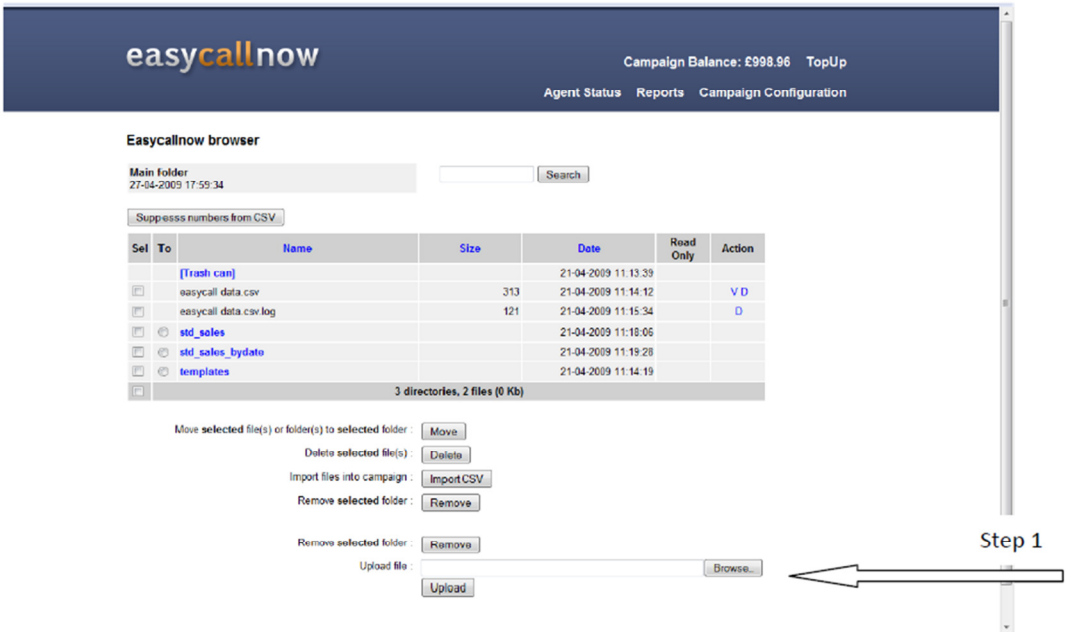
This screen is accessed by clicking on the IMPORT DATA button from the dataset analysis screen. It is used to import further data after the campaign has been created.

To perform any of the functions on the buttons below select the file by clicking in the box to the left and click the button required.

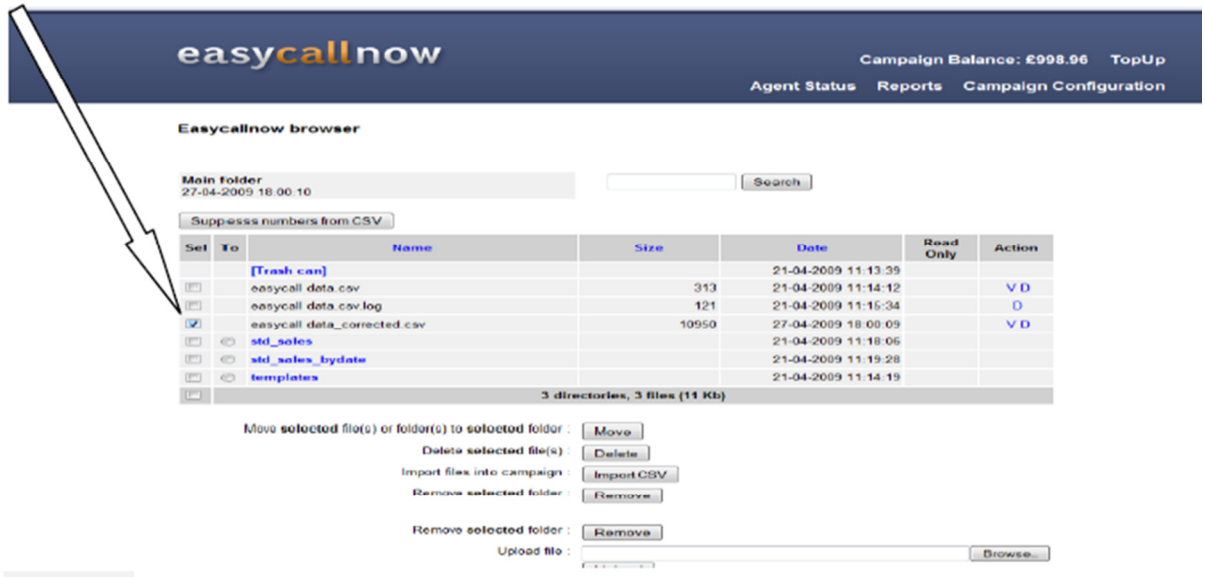
This screen will list out all the data file which have been uploaded, to upload a new file;

Step 1 Click the BROWSER button from the bottom of the screen

Step 2 Select the CSV file you wish to upload, the file will then be added to the list at the top


easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycallnow browser
Main folder
27-04-2009 17:59:34
Search
Suppesss numbers from CSV
Sel To Name Size Date Read Only Action
[Trash can] 21-04-2009 11:13:39
easycall data.csv 313 21-04-2009 11:14:12 V D
easycall data.csv.log 121 21-04-2009 11:15:34 D
std_sales 21-04-2009 11:18:06
std_sales_bydate 21-04-2009 11:19:28
templates 21-04-2009 11:14:19
3 directories, 2 files (0 Kb)
Move selected file(s) or folder(s) to selected folder : Move
Delete selected file(s) : Delete
Import files into campaign : Import CSV
Remove selected folder : Remove
Remove selected folder : Remove
Upload file : Browse...
Upload
Step 1

Step 3 Select the file by ticking in the box to the left then click IMPORT CSV


easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycallnow browser
Main folder
27-04-2009 18:00:10
Search
Suppress numbers from CSV
Sel To Name Size Date Read Only Action
[Trash can] 21-04-2009 11:13:39
easycall_data.csv 313 21-04-2009 11:14:12 V D
easycall_data.csv.log 121 21-04-2009 11:15:34 D
easycall_data_corrected.csv 10950 27-04-2009 18:00:09 V D
std_sales 21-04-2009 11:18:06
std_sales_bydate 21-04-2009 11:19:28
templates 21-04-2009 11:14:19
3 directories, 3 files (11 Kb)
Move selected file(s) or folder(s) to selected folder : Move
Delete selected file(s) : Delete
Import files into campaign : Import CSV
Remove selected folder : Remove
Remove selected folder : Remove
Upload file : Browse...

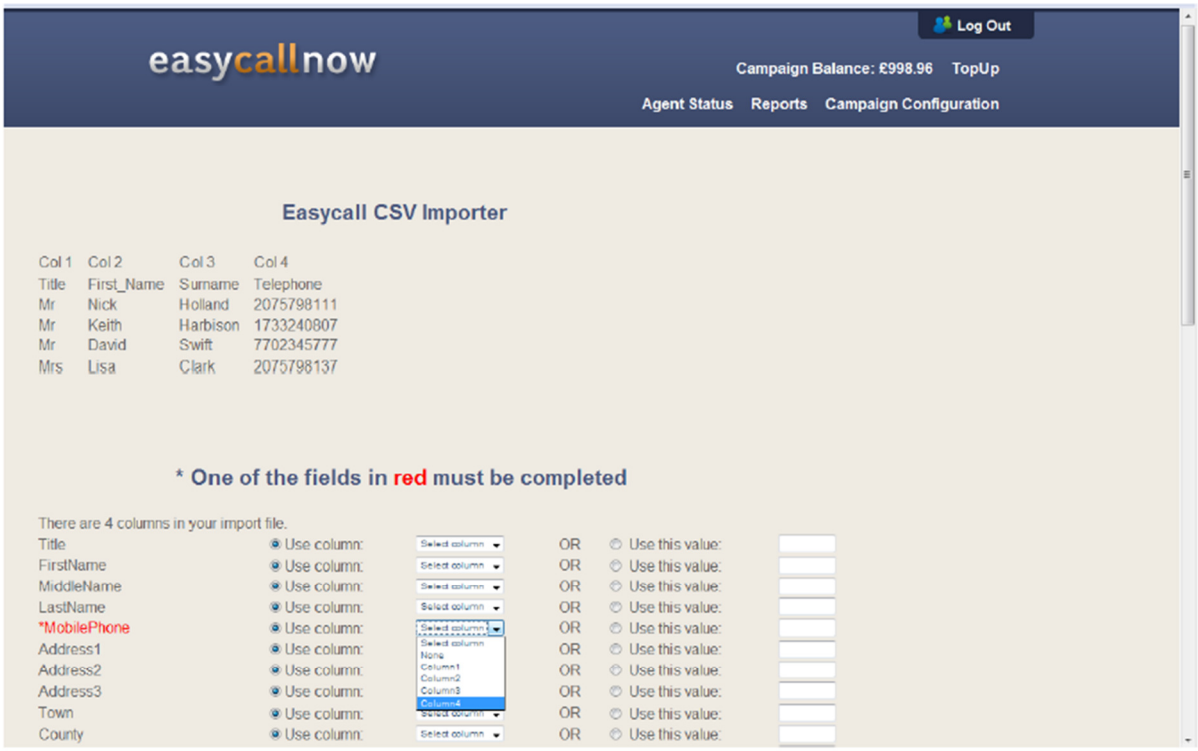
Step 4 Follow the on screen instructions to determine file content, click NEXT. A note regarding the checkbox “First line of the content headers” please make sure it is checked if your file contains a header line. This will make a later step much easier.

Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycall CSV Importer
Select CSV file:
Select Template Name:
How are the columns separated?
If in doubt try a comma (,) For tab put tab.
How many lines do you want to preview?
First line of file contains headers?
Next
Return to Dataset Report
Help Information
For beginners.
STEP 1. Choose an existing template or create a new one.
STEP 2. Type in your seperator character or put in the word tab to use tab as a seperator.
STEP 3. Choose how many lines you would like to preview.
STEP 4. Tick the box if you have a header line in your export file.

Step 5 Review the data file to be uploaded if correct click NEXT

easycallnow
Log Out
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycall CSV Importer
Col 1 Col 2 Col 3 Col 4
Title First_Name Surname Telephone
Mr Nick Holland 2075798111
Mr Keith Harbison 1733240807
Mr David Swift 7702345777
Mrs Lisa Clark 2075798137
Mr Dan Lower 7912255970
Mr Vince Sweeney 7968185613
Mr K Harbison 7976075387
Mrs L Clark 7921779850
Mr Keith Harbison 2075798106
Back
Next
Tips
To see the information in longer fields hold your mouse over the ...
If you are only seeing one field. Then use the back button to change your seperator

Step 6 Match the column headers just as you did within the campaign wizard (if you have not chosen to use a template) Click NEXT


easycallnow
Log Out
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycall CSV Importer
Col 1 Col 2 Col 3 Col 4
Title First_Name Surname Telephone
Mr Nick Holland 2075798111
Mr Keith Harbison 1733240807
Mr David Swift 7702345777
Mrs Lisa Clark 2075798137
* One of the fields in red must be completed
There are 4 columns in your import file.
Title Use column: OR Use this value:
FirstName Use column: OR Use this value:
MiddleName Use column: OR Use this value:
LastName Use column: OR Use this value:
*MobilePhone Use column: OR Use this value:
Address1 Use column: OR Use this value:
Address2 Use column: OR Use this value:
Address3 Use column: OR Use this value:
Town Use column: OR Use this value:
County Use column: OR Use this value:
Select column
None
Column1
Column2
Column3
Column4

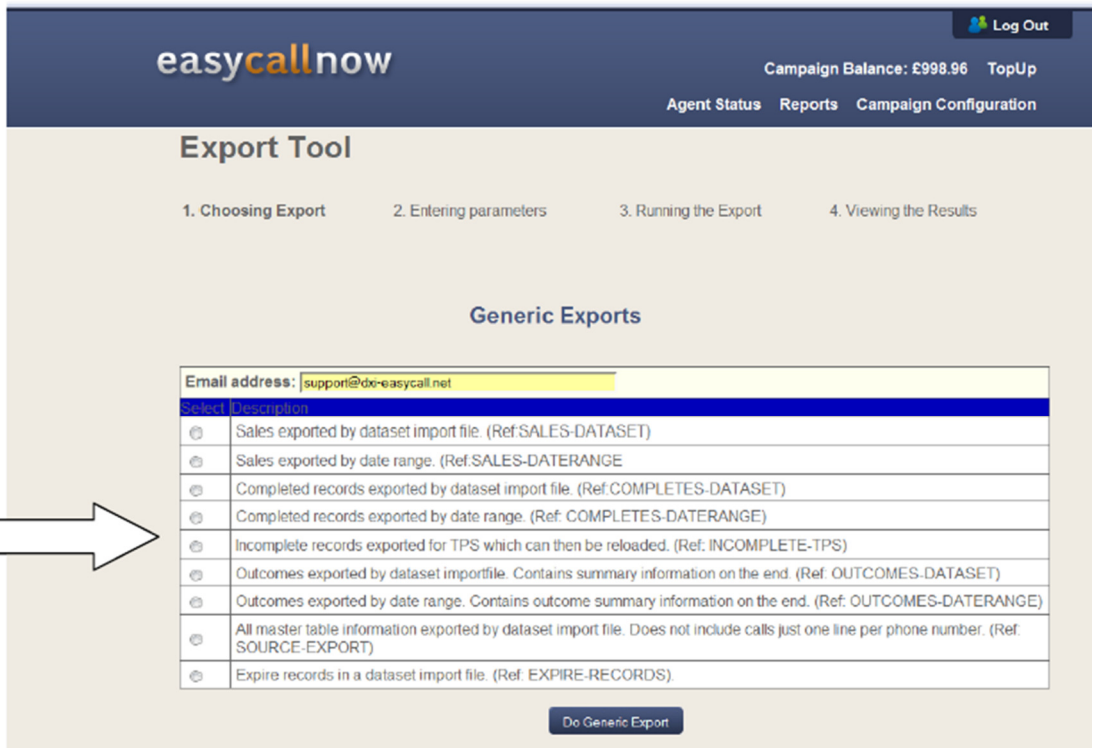
Step 7 Review the expected results for the data file, if any of the phone number file have no leading zeros the importer will prompt you as below then click FIX DATA

Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycall CSV Importer
These records have now been imported into a temporary table. Here is a table which summarises your import.
File Name which has become SoureFile: easycall data_corrected.csv
Reference number for queries on this import 3
Records in your file 409
Records imported successfully 409
Number of failed imported records 0
Summary of Import: All Records Created Succesfully
Number phone numbers not of at least length 7 0
Records left after cleaning bad ones 409
Records lost which have a length less than 7 or were null 0
The Phonenumer fix log: Phone Number Fix Log File These are numbers that were corrected. Either by removing spaces, adding a leading zero or replacing a leading 44 with zero.
For Administrators: Records have been written to the database EN_Final in table tmp_master.
Phone Prefix
Number of Records
Include
Remove
Fix the Data

Step 8 Completed this page is a results page which will display the number of records imported.

Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Easycall CSV Importer
Records have been Added in master table with datasetid of 3 is: 409
Return to Dataset Report

Exporting data tool


Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Export Tool
1. Choosing Export 2. Entering parameters 3. Running the Export 4. Viewing the Results
Generic Exports
Email address: support@dxi-easycall.net
Select Description
Sales exported by dataset import file. (Ref:SALES-DATASET)
Sales exported by date range. (Ref:SALES-DATERANGE
Completed records exported by dataset import file. (Ref:COMPLETES-DATASET)
Completed records exported by date range. (Ref: COMPLETES-DATERANGE)
Incomplete records exported for TPS which can then be reloaded. (Ref: INCOMPLETE-TPS)
Outcomes exported by dataset importfile. Contains summary information on the end. (Ref: OUTCOMES-DATASET)
Outcomes exported by date range. Contains outcome summary information on the end. (Ref: OUTCOMES-DATERANGE)
All master table information exported by dataset import file. Does not include calls just one line per phone number. (Ref: SOURCE-EXPORT)
Expire records in a dataset import file. (Ref: EXPIRE-RECORDS)
Do Generic Export

Step 1

The exporting data tool is accessed via the dataset analysis report using the EXPORT DATA button. The export is performed in four easy steps;

Step 1 Choose the export you want to run by selecting a radio button.
Step 2 Select the data of which you want to run the export against using radio buttons provided.

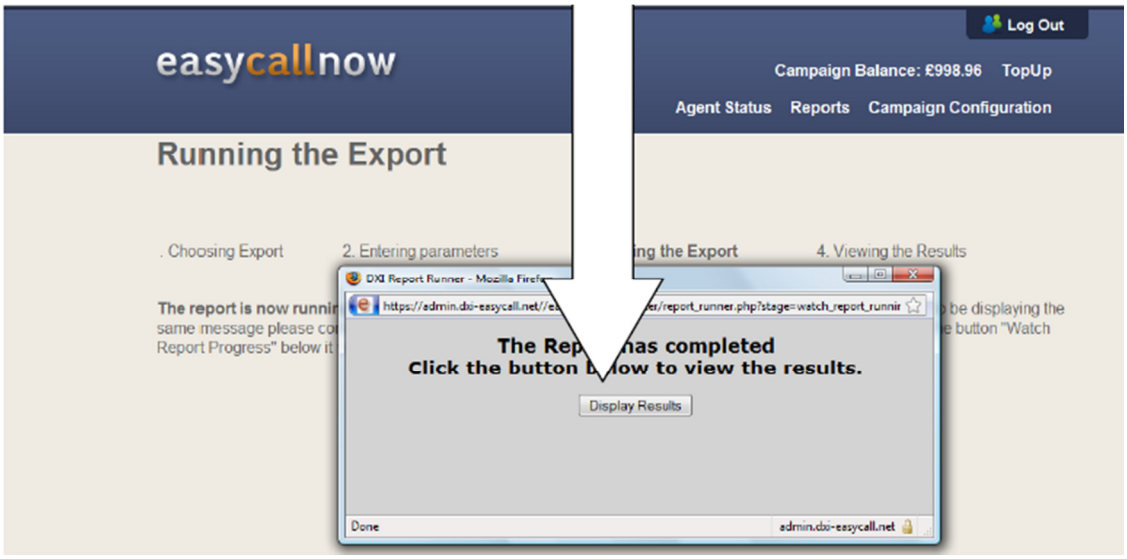
Step 2

Step 3 the export is now running and you have the option to watch the report progress or run another export, if you run another report you will start the loop and go back to step 1 again.

Step 3

Log Out
easycallnow
Campaign Balance: £998.96 TopUp
Agent Status Reports Campaign Configuration
Running the Export
. Choosing Export
2. Entering parameters
3. Running the Export
4. Viewing the Results
The report is now running. You should see a popup screen now with it's progress. If it fails to complete or seems to be displaying the same message please contact support@dxi-easycall.net. If you accidentally close the window that's ok just click on the button "Watch Report Progress" below it will create another watcher window for you.
Watch Report Progress
Run Another Export

Step 4 the report is complete you can view the report by clicking DISPLAY RESULTS button



Step 5 the report results can be viewed and the export can be downloaded by clicking the link in the box.

1. Choosing Export 2. Entering parameters 3. Running the Export **4. Viewing the Results**

Results from the report	
Report name:	GENERIC_SALES_DATASETID
User name:	2825
URL to downloadfile:	Click here to Download your export
Reference datasetid for export:	1
Sourcefile Exported:	easycall data_corrected.csv
FileName Given to export:	Final_sales_1easycall data_corrected.csv.csv
Number of records:	1
The report outputted the following additional information:	

```
Campaign name: Final
And clause: Easycall.outcomecode.Sale='Y'
File: easycall data_corrected.csv
Selecting DB: EN_Final
Outputting headerline
Number of rows: 1
Entering loop sleeping every 1 records.
Email is the default so just use the to header.
Done
```

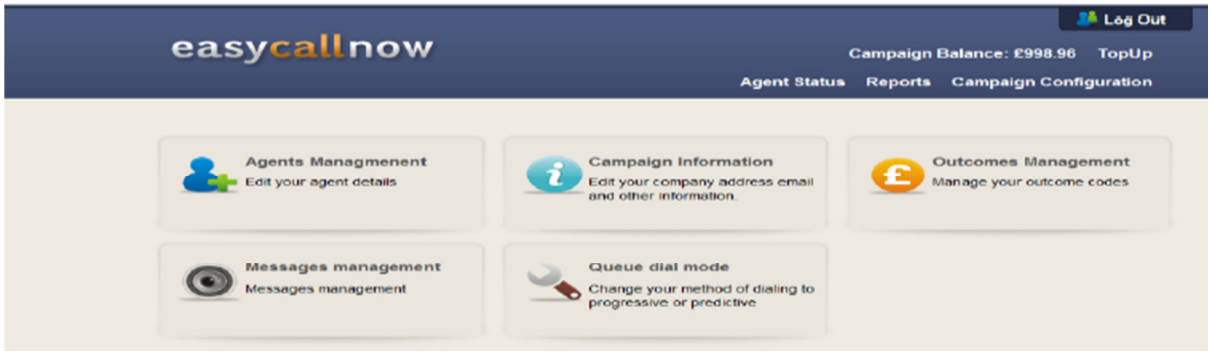
Return to Report Runner start

Return to Dataset Report

Campaign configuration

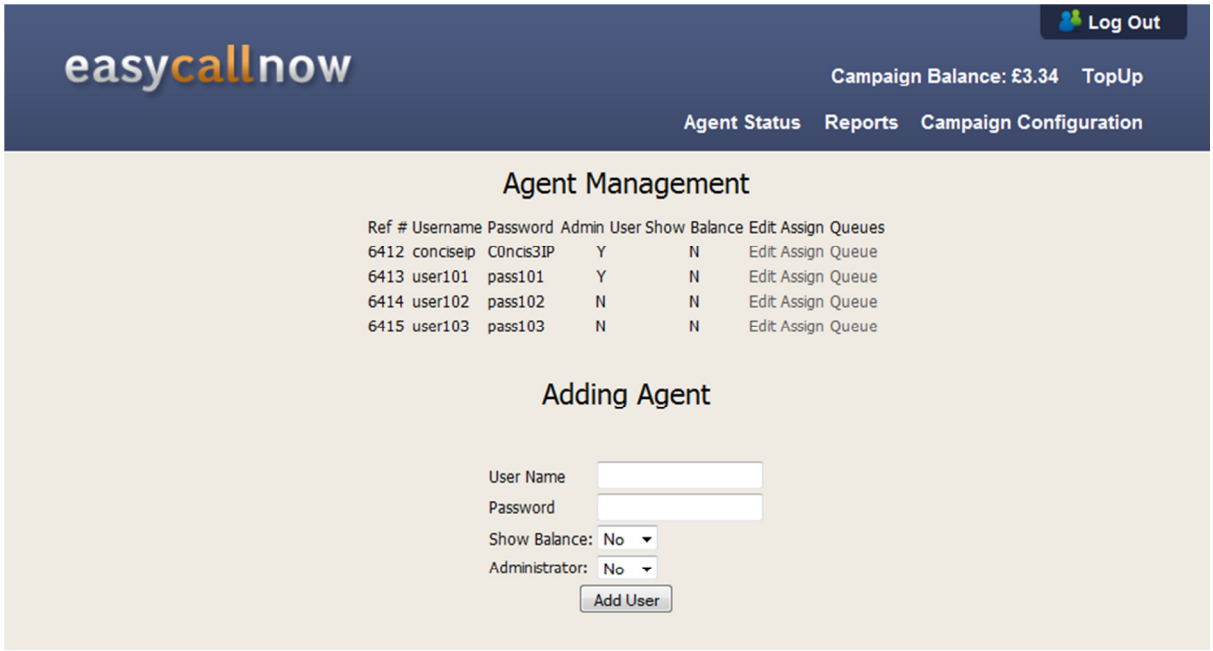
Campaign Management

The maintenance and configuration of your campaign can be accessed via these options.



Agent management

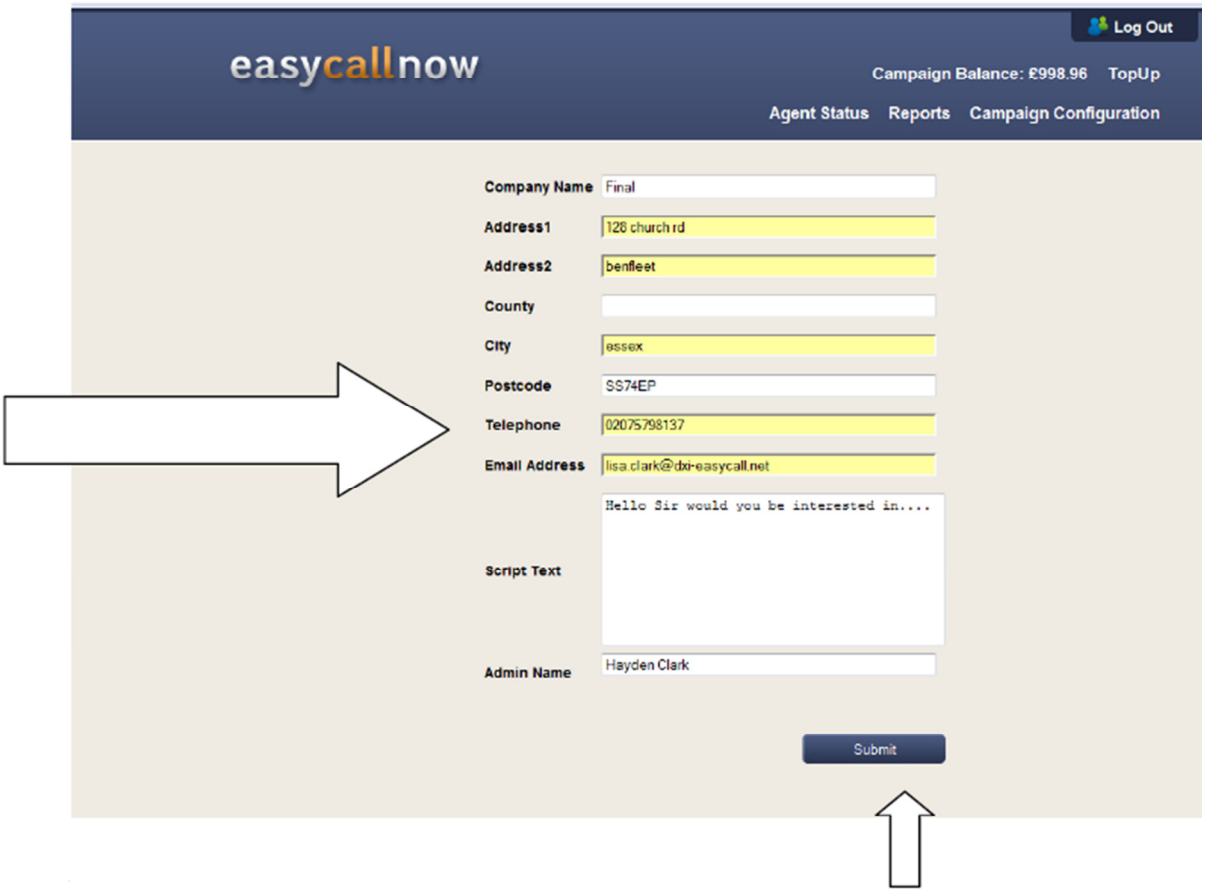
This screen enables you to add or edit agents detail such as passwords


easycallnow
Log Out
Campaign Balance: £3.34 TopUp
Agent Status Reports Campaign Configuration
Agent Management
Ref # Username Password Admin User Show Balance Edit Assign Queues
6412 conciseip C0ncis3IP Y N Edit Assign Queue
6413 user101 pass101 Y N Edit Assign Queue
6414 user102 pass102 N N Edit Assign Queue
6415 user103 pass103 N N Edit Assign Queue
Adding Agent
User Name
Password
Show Balance: No
Administrator: No
Add User

Add / Edit agent information

To **add** an agent simply type the details in the spaces available and click the SUBMIT button
To **edit** an agent select the agent **Uid** and the information will be displayed in the lower boxes and can be edited accordingly selected submit when complete.

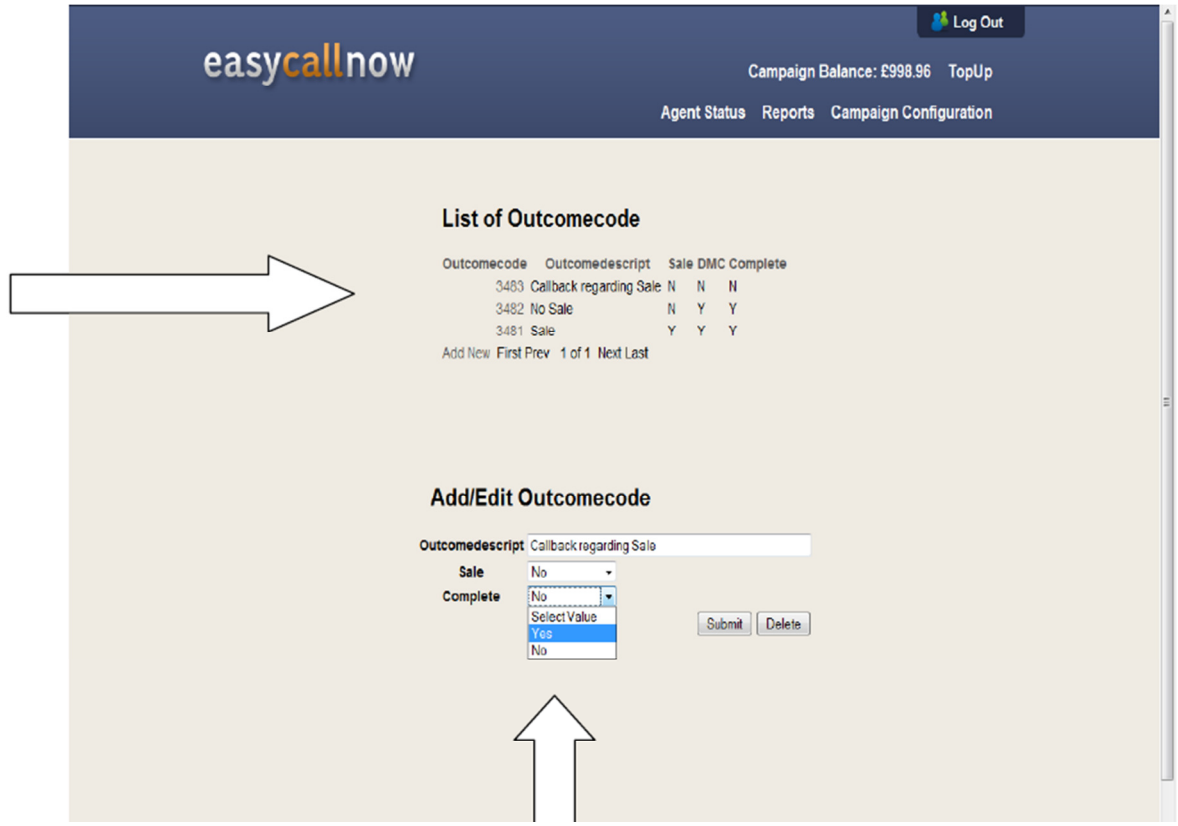
Campaign Information
The campaign information can be edited via this screen



Edit Script text
The script text can be changed at any time via this screen, it will display what was entered when you created the campaign during the wizard process and when the information is correct click SUBMIT button.

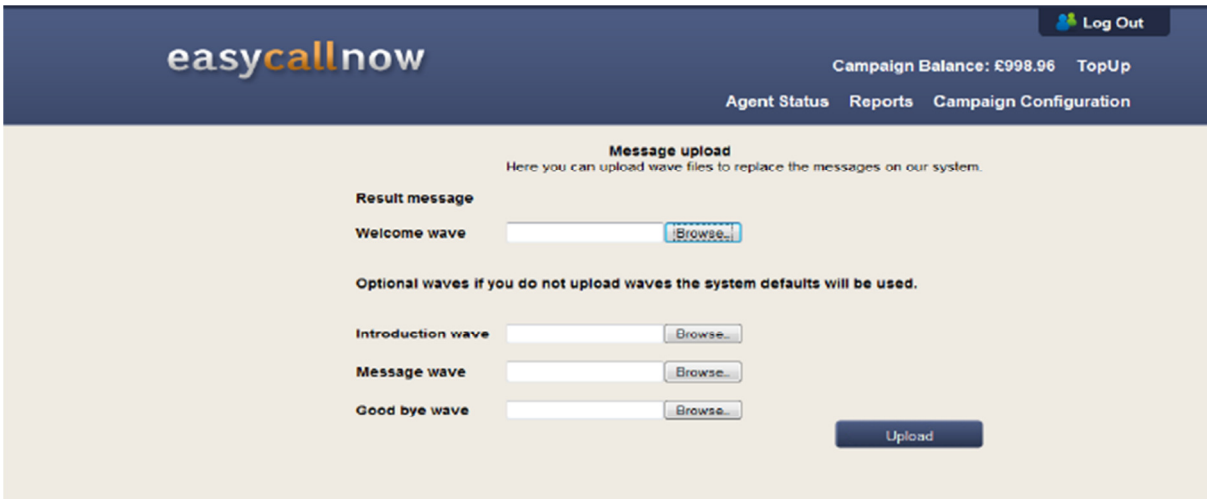
Editing administrator email address / information
The administrator email address can be changed via this screen, this is in case you change your email address after you had created the campaign via the wizard, it is important you update this information to ensure you receive essential campaign information, such as balance information. Other company/ admin information can also be edited via this screen allowing you to update address, phone number and administrator name at any time to ensure your company contacts stay up to date with any important campaign information.

Outcomes management
This screen enables you to add or edit call outcomes
Add / Edit call outcome codes
To add an outcome code simply type the details in the spaces available and click the SUBMIT button



To edit an outcome code select the outcome code number and the information will be displayed in the lower boxes and can be edited accordingly.

Message management
Your campaign messages can be changed via this screen; any WAV files uploaded on this screen will OVER WRITE any existing messages

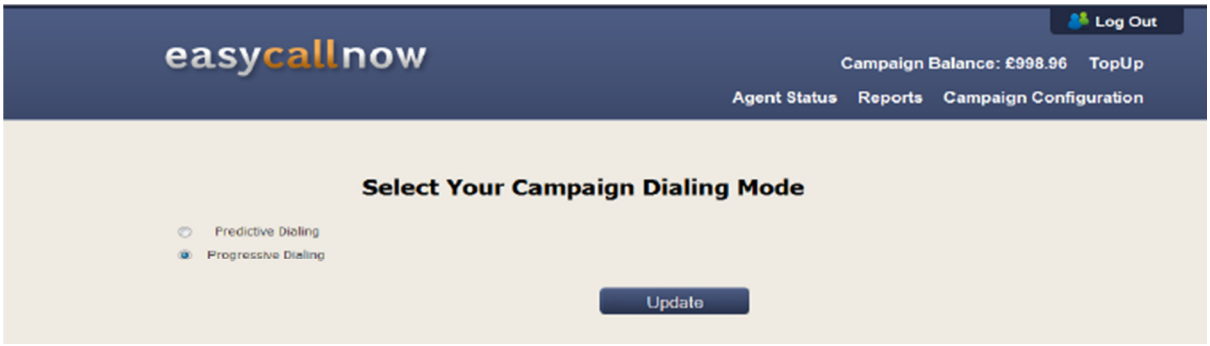


Queue dial mode

The queue dial mode can be change via this screen

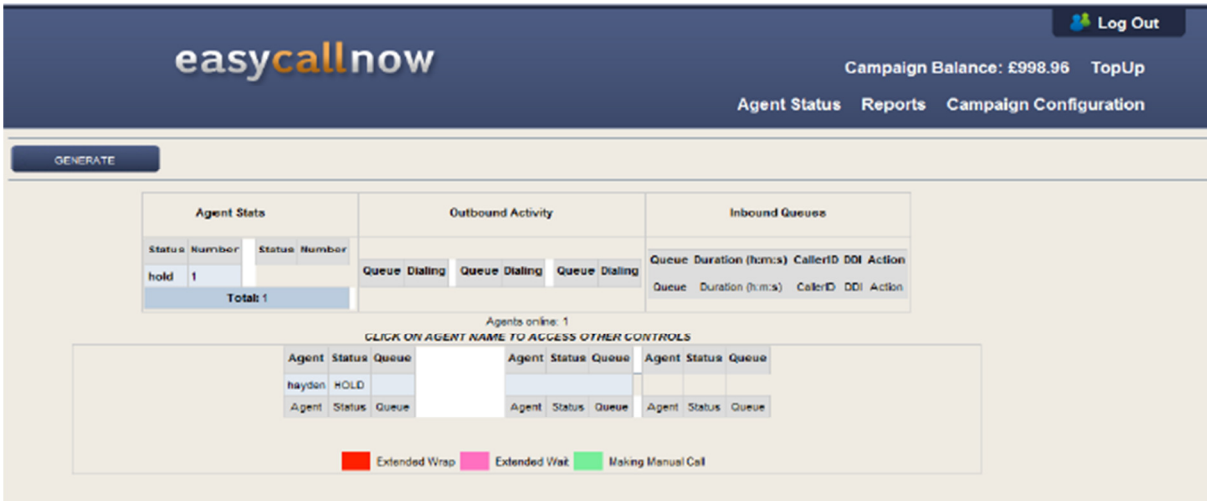
Progressive dialling will dial one customer line for every agent waiting a connection.

Predictive dialling will calculate how many numbers to dial to minimise time of agents waiting for a connection.



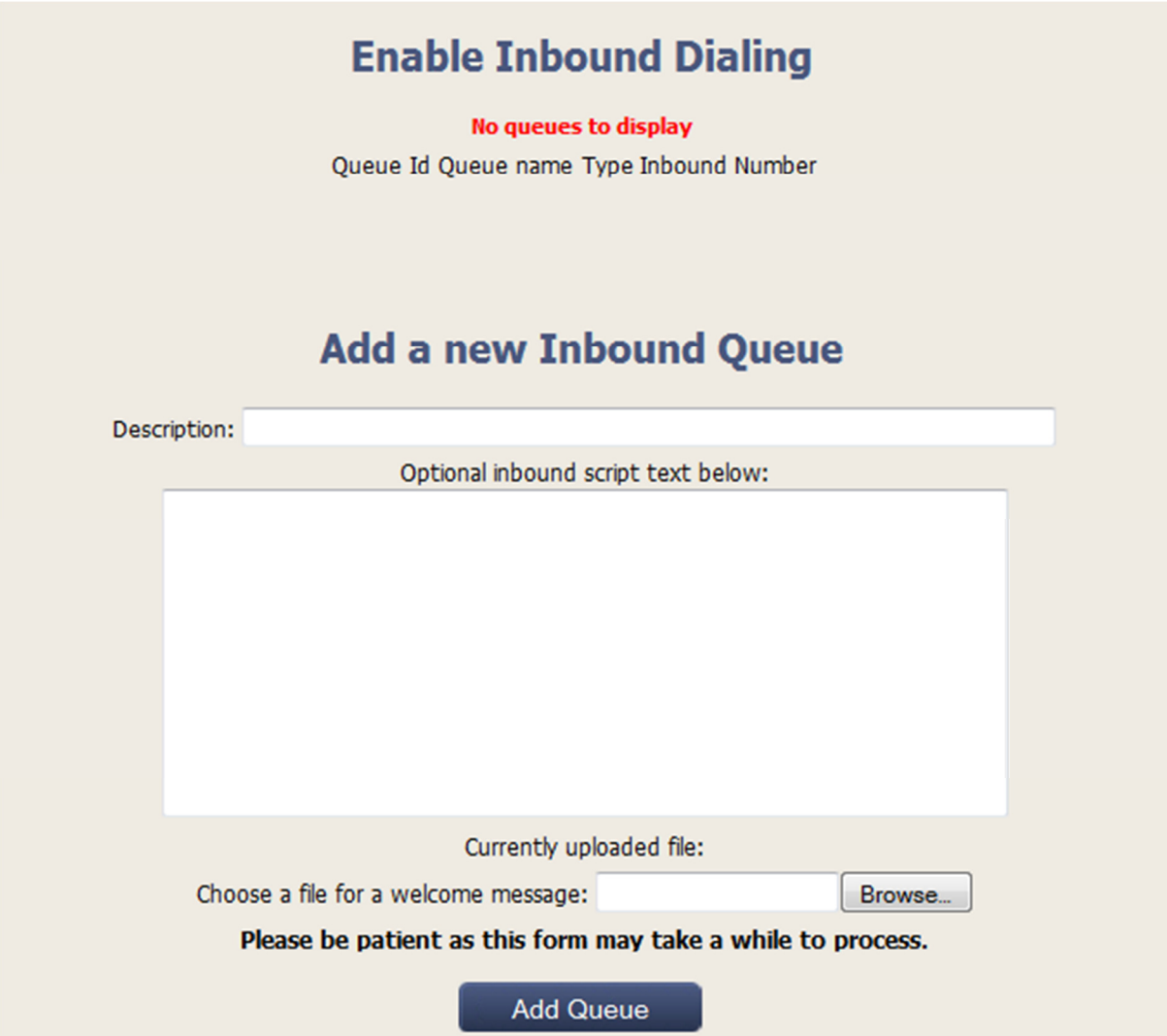
Agent status screen

This screen shown the live state of the agent for example wrap or wait, individual agent statistics can be viewed by clicking the agent name



Inbound configuration

Enable Inbound Queuing

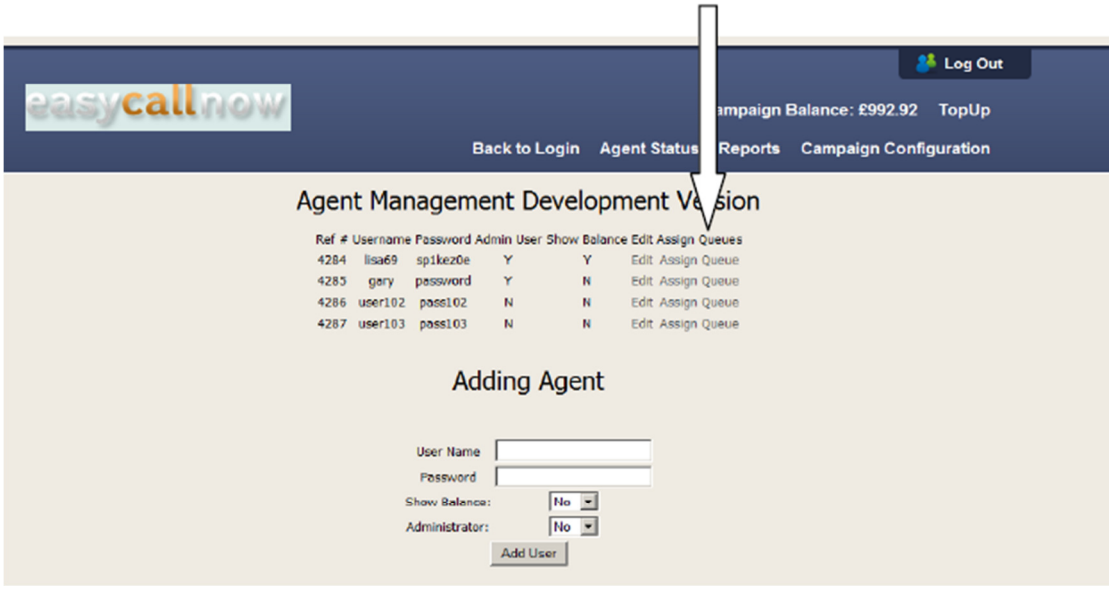

Enable Inbound Dialing
No queues to display
Queue Id Queue name Type Inbound Number
Add a new Inbound Queue
Description:
Optional inbound script text below:
Currently uploaded file:
Choose a file for a welcome message:
Browse...
Please be patient as this form may take a while to process.
Add Queue

You can add an inbound queue by giving the inbound queue a description and script if desired also a welcome message, which will be played to the customer prior to connecting to the agent, then clicking the add queue button.

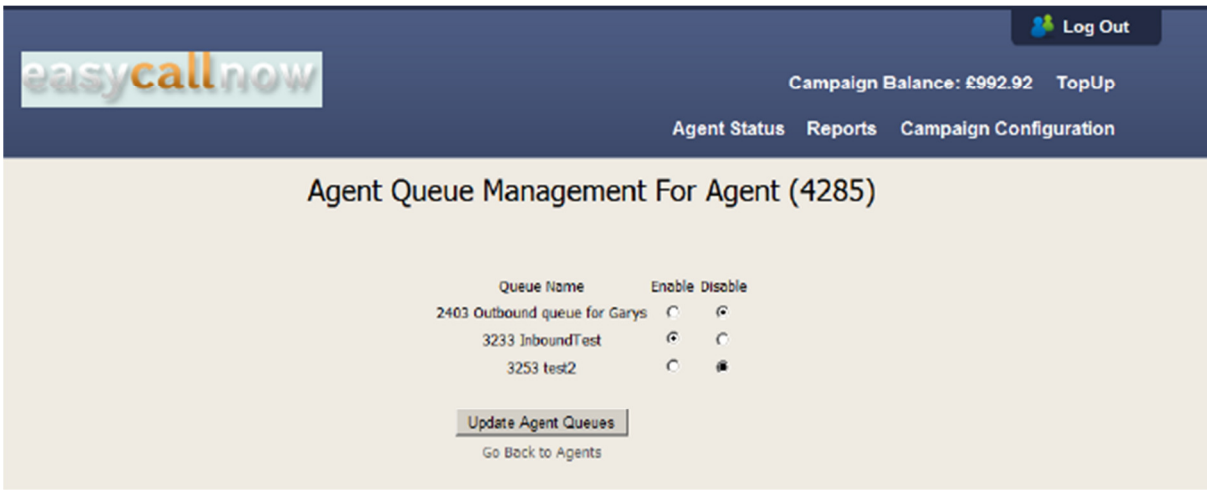
Once the queue is created you can edit the queue description and message played at any time by selecting the edit link next to the queue.

Agent Stat
Reports
Cam
Enable Inbound Dialing
Queue Id Queue name Type Inbound Number
3233 InboundTest. inbound 08452860163 Edit
3253 test2 inbound 08452860167 Edit
3257 test. inbound 08452860171 Edit
3258 testagain inbound 08452860172 Edit
3263 testWAV inbound 08452860173 Edit
Editing Queue #3253 of campaign garys
Description: test2
Optional inbound script text below:
Currently uploaded file:garys_VF_1.wav
Choose a file for a welcome message:
Browse...
Please be patient as this form may take a while
rocess.
Update Queue

This screen in edit mode will display the file name which is currently uploaded also editing the script displayed to the agent.
Once the queue is created it is important to assign the agent to the relevant queues, you can do this by clicking the assign queue tab associated with the agent name.



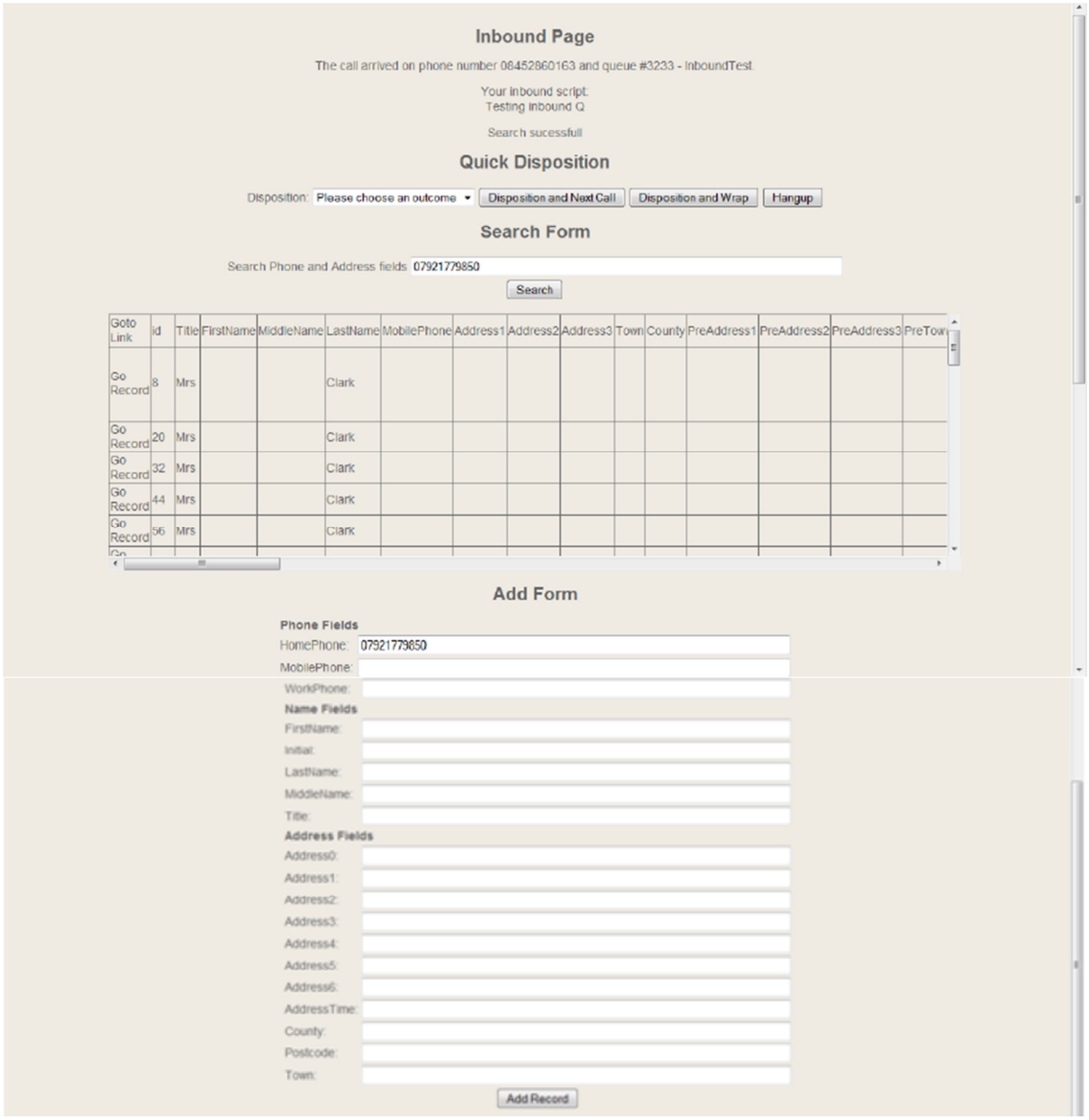
Each agent can be assigned to each of the queues by selecting the enable and disable buttons below. Each agent can be assigned to individual queues or multiply, providing them with access to outbound, inbound or blended dialling.



Once the agent is set up they login the same way and wait for calls, once an inbound call is connected that screen below will be displayed to the agent. This screen always asks the agent to perform several tasks.

- Search the existing database for the record of the customer
- Create a new record for the customer on the inbound call
- Add a new record
- Complete the call using the quick disposition buttons on this screen

Once the agent has created or found the relevant record, they can select it by clicking the go to record link, attached to the relevant row.



Once the agent has selected the record the screen below will display the script below. This screen works in the same way as the outbound script, with all the functions to edit information and disposition the records.

If the agent disposition the call as a callback this will be assigned to the outbound queue, the agent must be assigned to the outbound queue to receive these calls as well.